AQLnet User Guide

Edition 2.2

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For more information contact:
Sirius Concepts Ltd
Oswald Hall
Auchincruive
Ayr
Scotland
KA6 5HW Telephone: +44 (0)1292 521376 Fax: +(44) (0)1292 525939

Or find us on the Web: http://www.sircon.co.uk

Updates

Sirius Concepts reserve the right to revise this publication and make changes from time to time in content.

This is not a controlled document. It is the responsibility of the licensee to ensure that their user manual is up to date. Updates can be downloaded from AQL Web Resources.

Client Engagement

This manual sets out how AQLnet functions and options available to users. The context in which it used – the protocols and guidelines surrounding its use in providing client services are not covered.

Support

Telephone: +44 (0)1292 521376
Email: support@sircon.co.uk

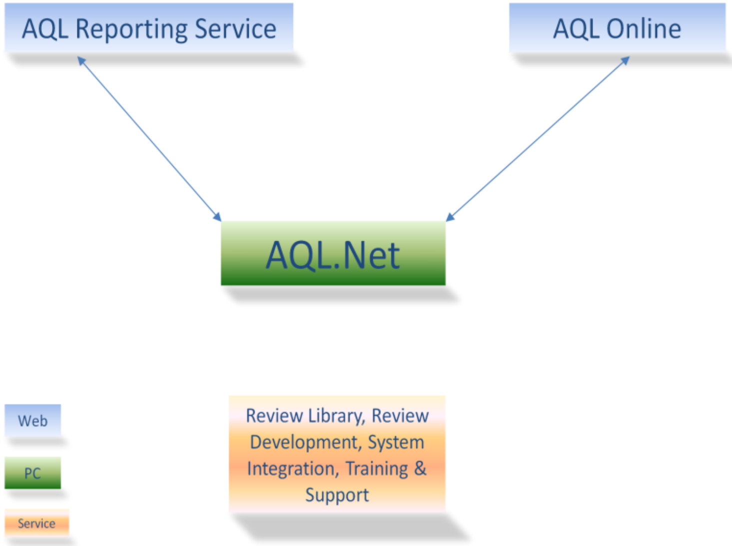
Table of Contents

Introduction

AQLnet is a system to help professionals deliver advice and support to their clients. The system allows a detailed action plan to be created from an assessment against a set of specialist questions and/or from a SWOT Analysis. A library of Questions Sets provides general business developments reviews while a Question Set builder enables experts to create Question Sets in their speciality.

AQLnet can be used as a support tool by individual advisers and consultants to deliver a high quality service to their clients and to manage their work portfolio. For consulting organisations AQLnet provides a common approach to service provision while retaining the individual strengths of their advisory team.

With reports in Word format and integration into Microsoft Office applications AQLnet is the ideal business professionals support application.



AQL Product Integration

AQLnet can be combined with the web based AQL Reporting Service to provide monitoring, reporting and analysis on all the advisory services provided by a consultancy or economic development agency.

For a fully comprehensive service offering AQLnet can be linked with AQL Online , a web based self assessment and action planning service, which allows clients to undertake a basic review before an in depth engagement with an adviser.

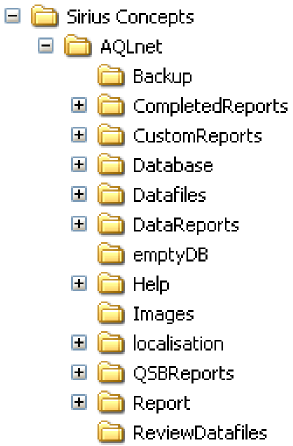
i. Installing AQLnet

Run the installation package to place the AQLnet shortcut  on the PC desktop.

AQLnet requires Microsoft's .Net framework, the PC will be automatically checked for this software, if it is not found it will be downloaded and installed form a Microsoft site.

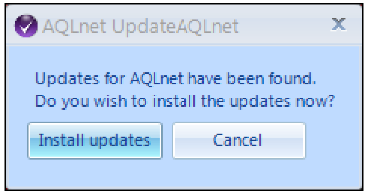
Installation folders

The following folders are placed in the default installation location of 'Program Files'.

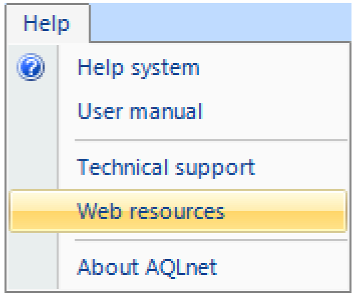


Updates

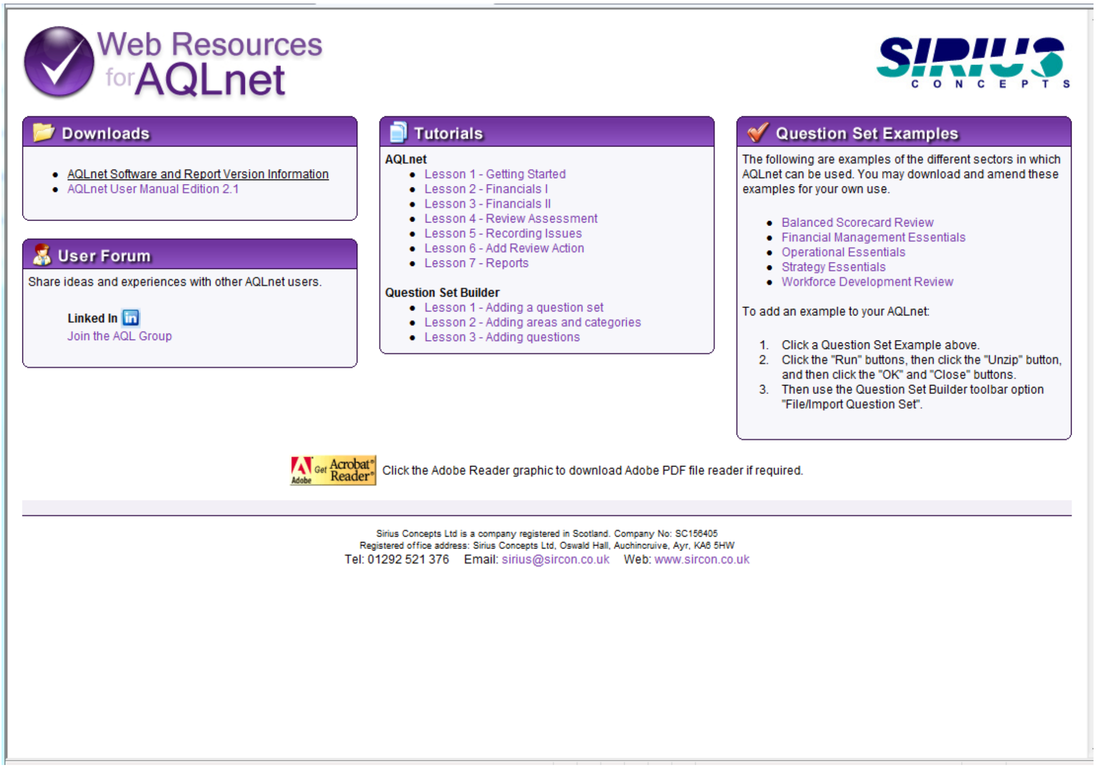
Users with a support contract will receive free updates. The software will periodically check for the latest version. When a new update is found a message will be displayed before the update is applied.



i. Learning AQLnet



Use this manual and the online Help system to learn AQLnet. An example organisation, New World Services Ltd, is included which can be used for practice and experimentation. Useful information, including tutorials, may also be found on the Sirius web site. Access these pages through the Web resources option on the menu bar.



Alternatively help may be received by calling +44 (0)1292 521376

Part I: Using AQLnet

How to carry out assessments, identify issues and create actions plans

Part II: Set up and Question Set Creation

How to configure AQLnet and make you own specialist question sets

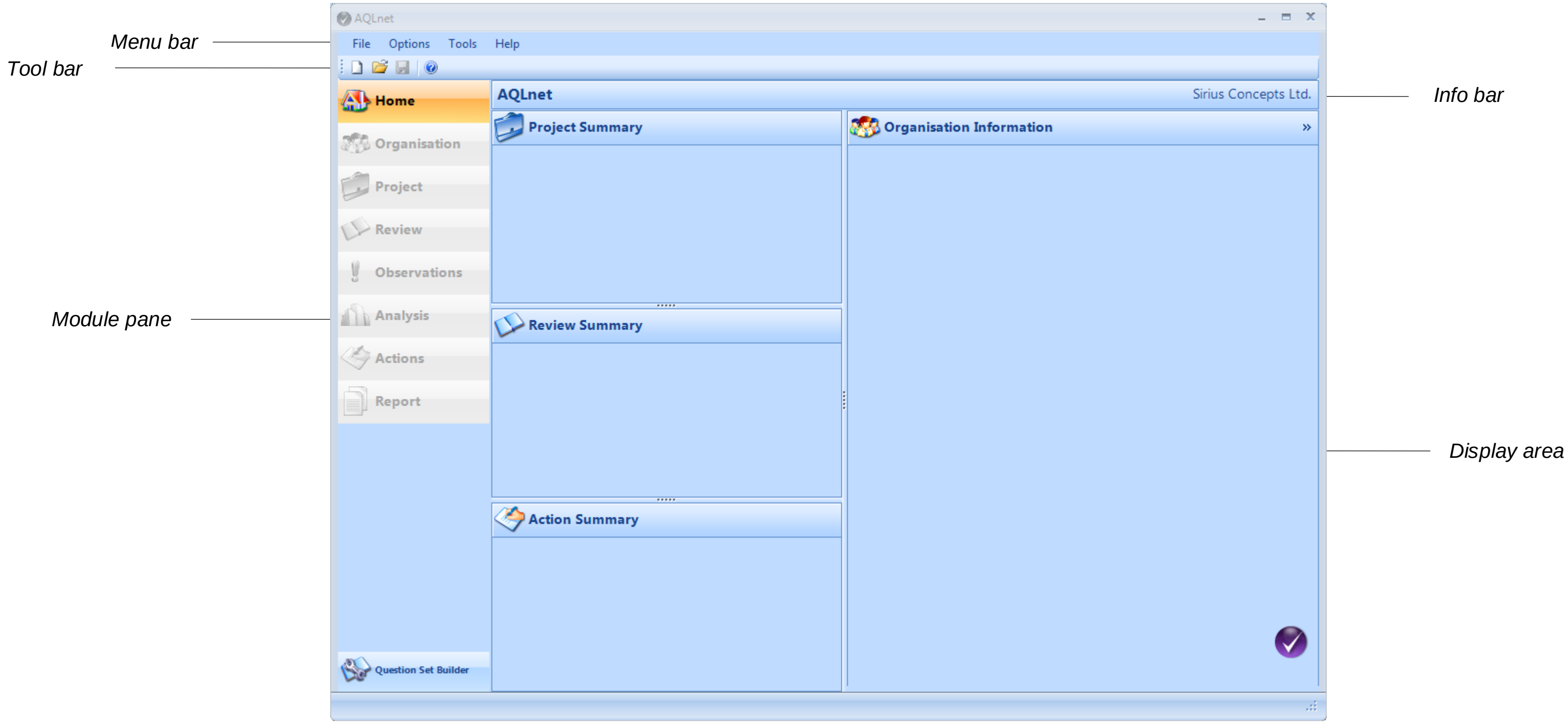
Part III: Integration with AQL Reporting Services and AQL Online

How to use AQLnet as part of management system for service delivery

Part I: Using AQLnet

1. Working with AQLnet 

The view when AQLnet is started.



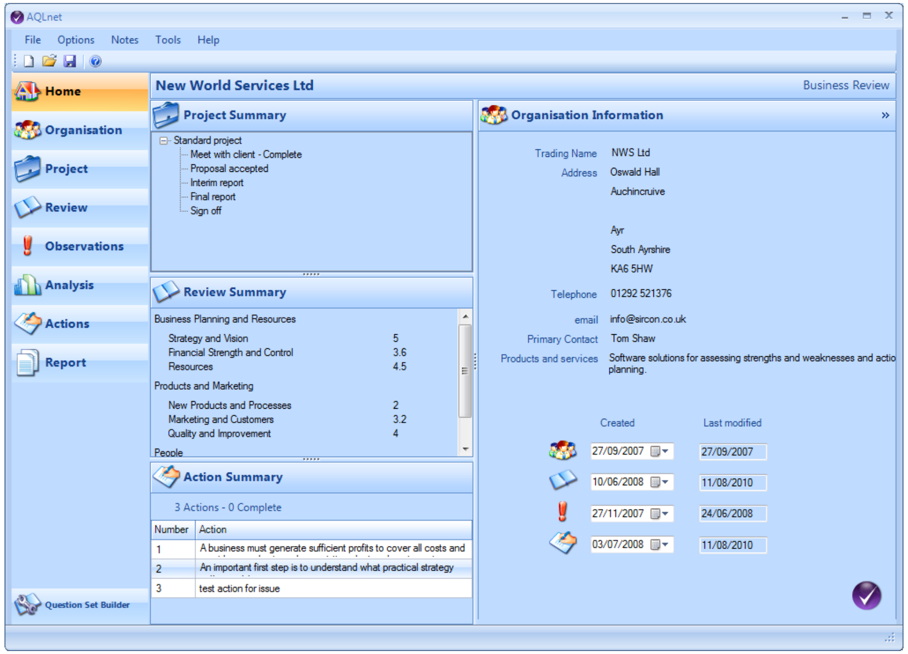
The AQLnet interface is made up of five sections:

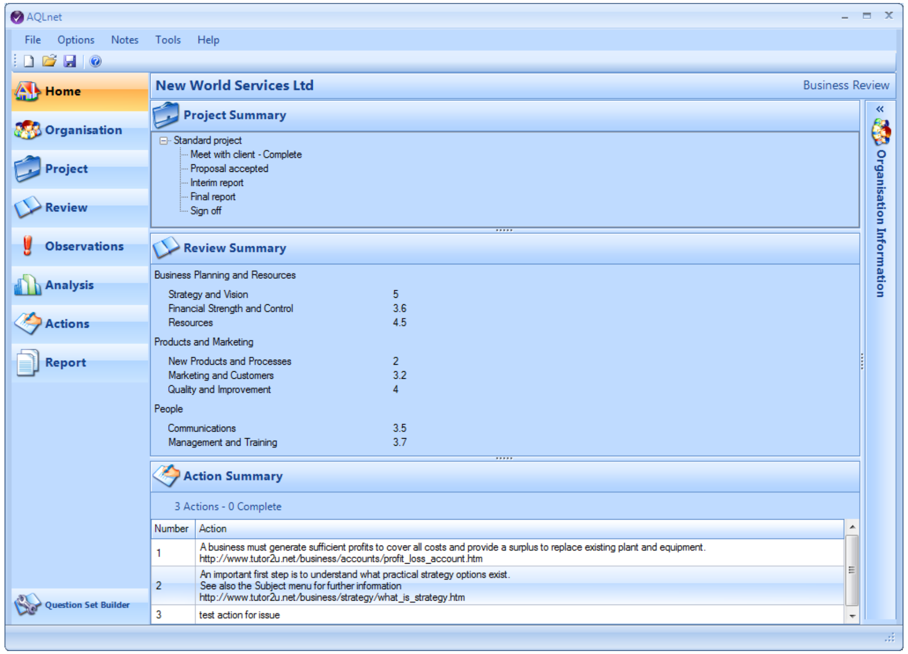
- Menu bar - execute commands and access dialog boxes
- Tool bar - a collection of buttons that use shortcuts to commonly used menu commands
- Module pane - access to the major modules of AQLnet
- Info bar - displays the name of current organisation and question set
- Display area - display and work area for the selected module

When working with an organisation the Home display summaries the current position.

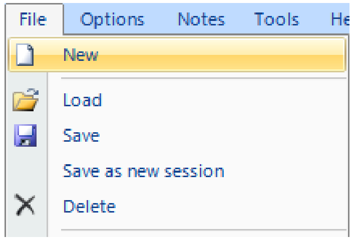
Project Summary	Project milestones and their status
Review Summary	Average score for each question set category
Action Summary	Entries in the action plan
Organisation	Contact information and last modification date

Within the display area the size of each section may be adjusted to give the best display by moving the screen splitters .

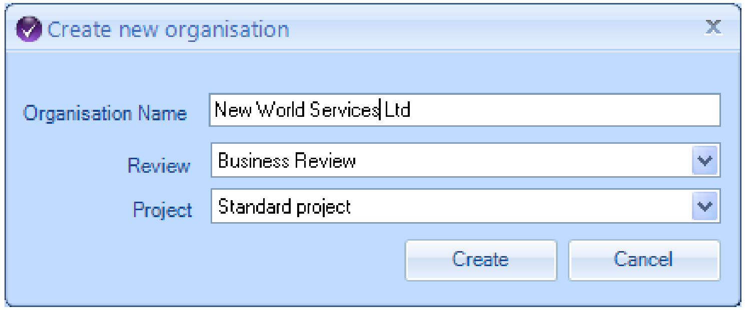


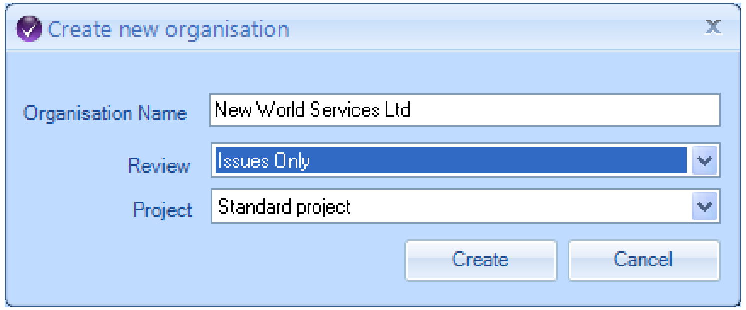


2. Entering a new organisation

To enter a new organisation select 

or click  from the Tool bar. In the displayed dialogue window type the name of the organisation, from the Review drop down select the set of questions to be answered and the project being undertaken. To record only issues and ignore review questions select Issues Only in the review selection box.

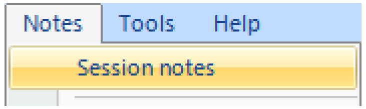




Click  to confirm organisation name and selected set of questions.

Click  to record data about this organisation.

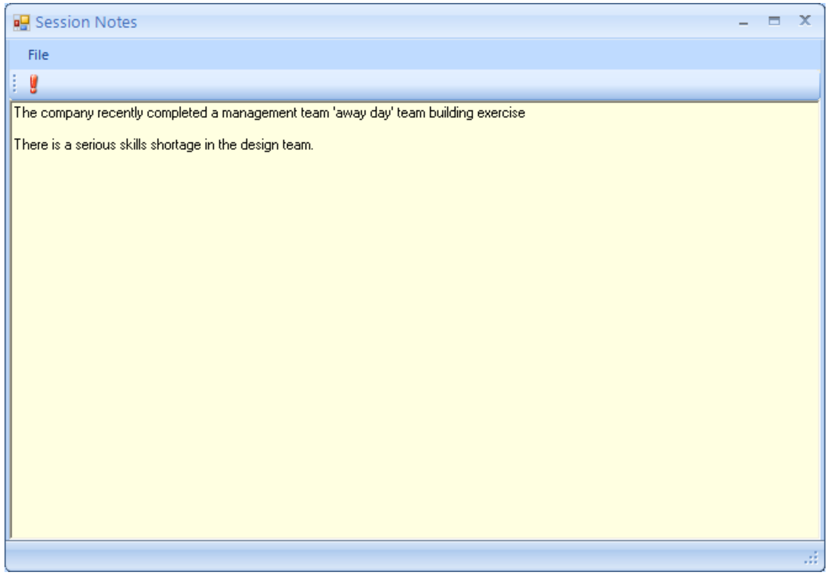
2.1 Notes

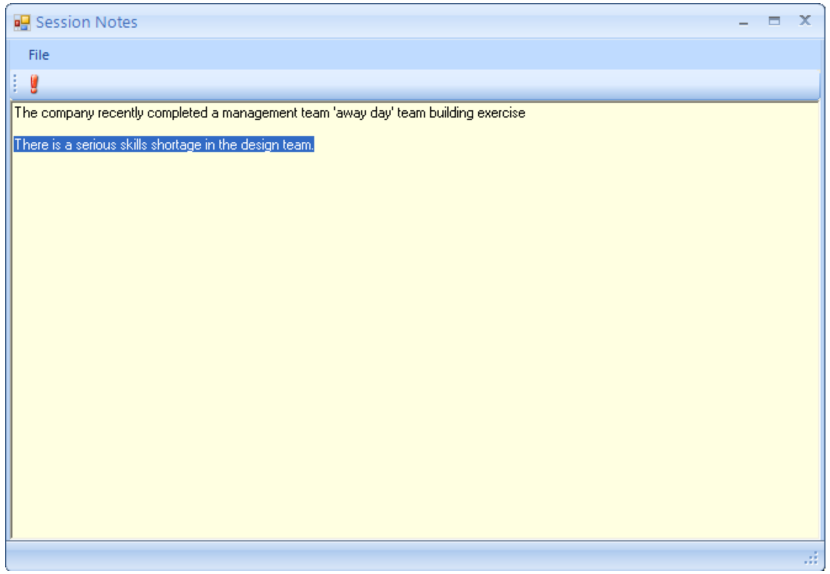
General notes on an organisation can be recorded at anytime using the Session Notes option on the menu bar. 

The notes recorded here are not specific to any module of AQLnet, however any note may be identified as an issue and will be added to the Issue module. (see section 6)

To identify a note as an issue highlight the text then click . The text is added to the Observations module as an unclassified issue.

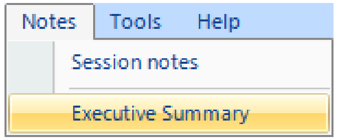
(Once a note has been identified as an issue it will remain in the Observations module even if the note text is deleted.)



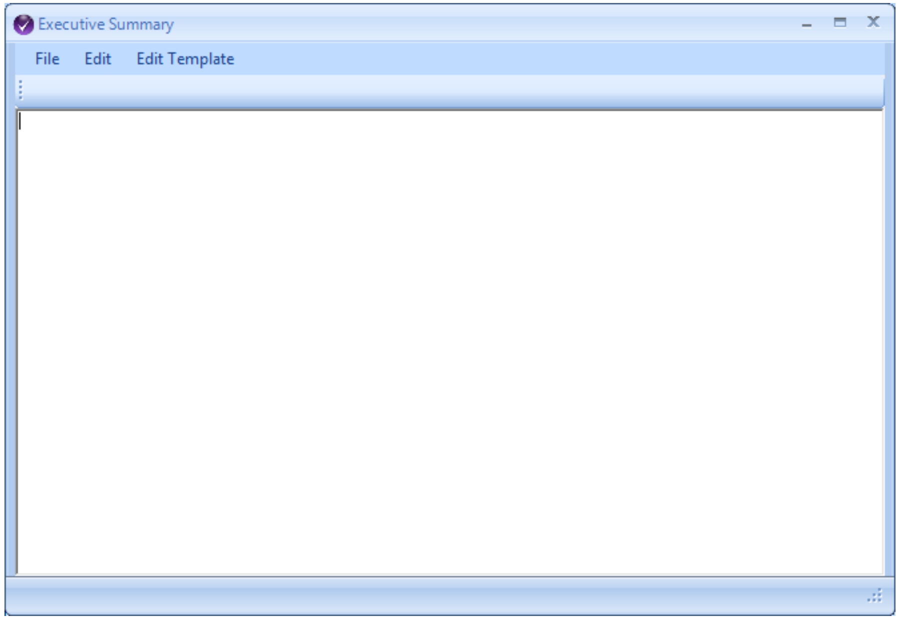


2.2 Executive Summary

The Executive summary is a special note for use in client reporting.



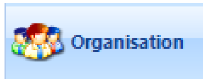
Text entered here is automatically included in all reports with an executive summary section.



To create a pro forma summary click on the Edit Template. The template text is shown for each new organisation but may be edited in the usual way.

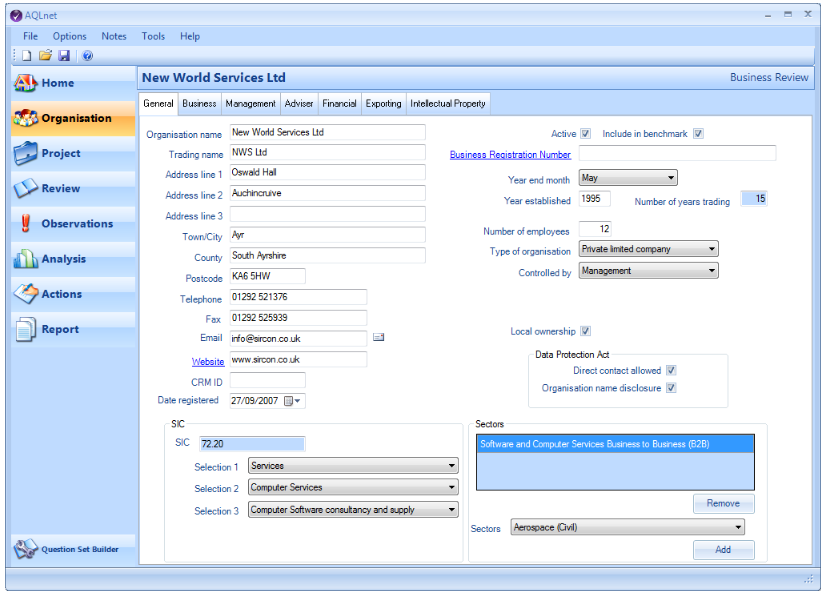
2.3 Spell checker

To check the spelling of entered text click into the text box and do a right mouse click. From the displayed options select Check spelling.

3. Organisation 

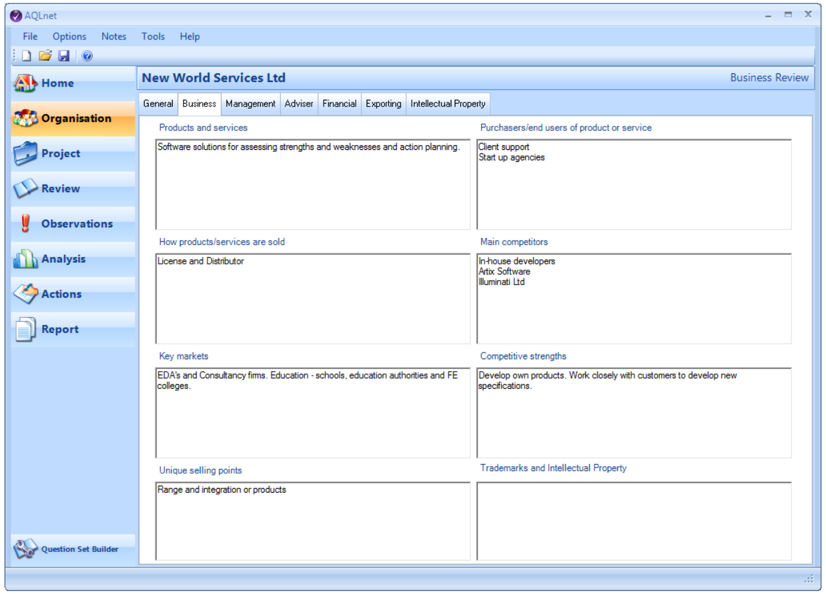
The organisation module is used to record details on the client. There are six fixed tabs. An eight tab for custom fields may be created, see section 13.1.6.

3.1 General tab

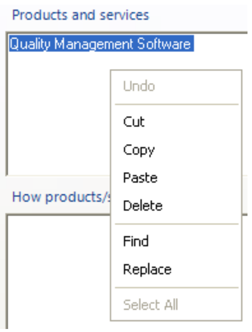


Under the General tab contact information on the organisation can be recorded. For drop down options the items in the list may be modified using the setting option (see 10.2). Underlined text labels indicate a hyperlink to an information web site. The organisation may be classified using the SIC finder. This Standard Industry Classification Code uses the UK DTI classification system. For a custom classification use the Sectors option.

3.2 Business tab



The Business tab is used to record information on eight key indicators. Text recorded here may be copied/pasted from/to other applications. To copy text from any part of AQLnet click into the text box followed by a right mouse click to display the edit options.



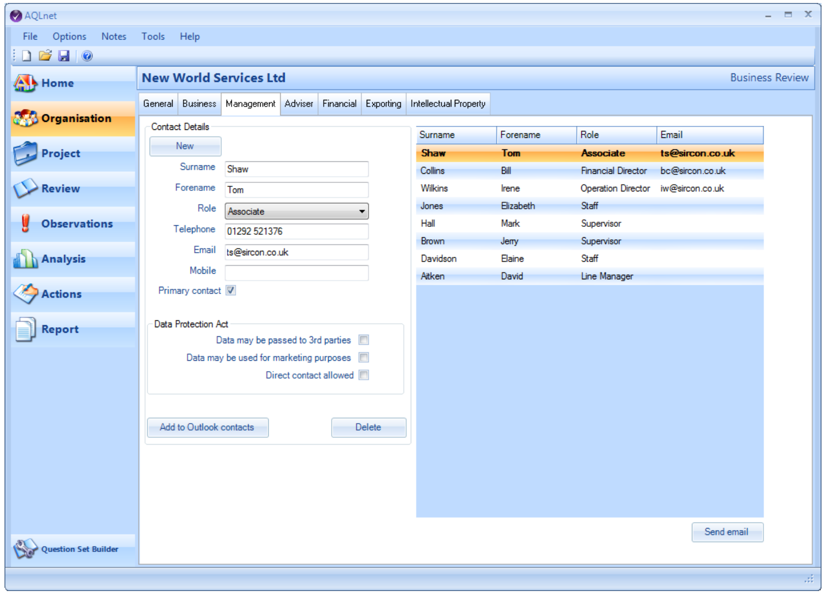
3.3 Management tab

This section is used to record the management team of the organisation. The right hand side of the display shows the team members. The left hand side has the edit panel where new member can be added, existing members removed or details amended. To add a new member click . New

To indicate the primary contact click on Primary contact ☐

To send an email, select the contact and click on Send email

To add contact to Outlook, select the click on Add to Outlook contacts



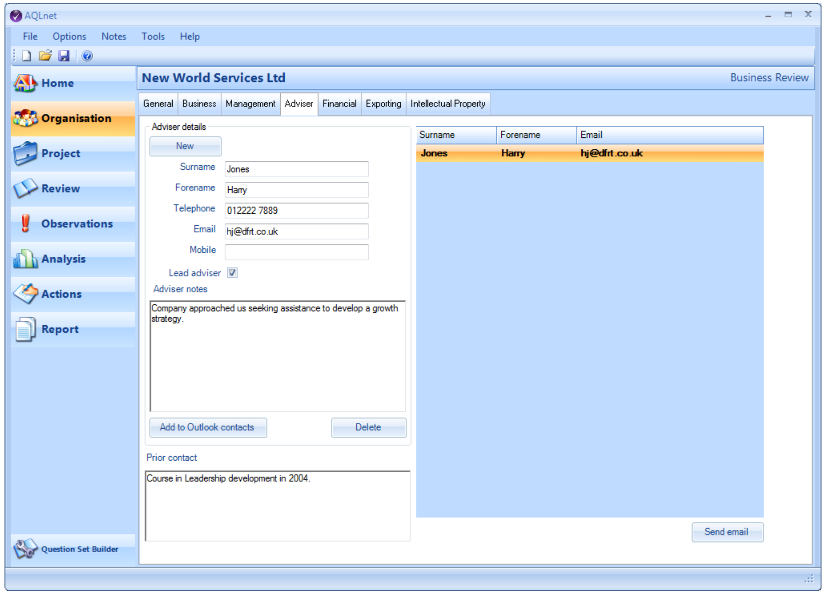
3.4 Adviser tab

This tab is used to record details on advisers who are involved in providing assistance to the organisation. Adviser notes and prior contact details may be added.

To indicate the lead adviser click on Lead Adviser ☐

To send an email, select the adviser and click on Send email

To add adviser to Outlook address book click on Add to Outlook contacts

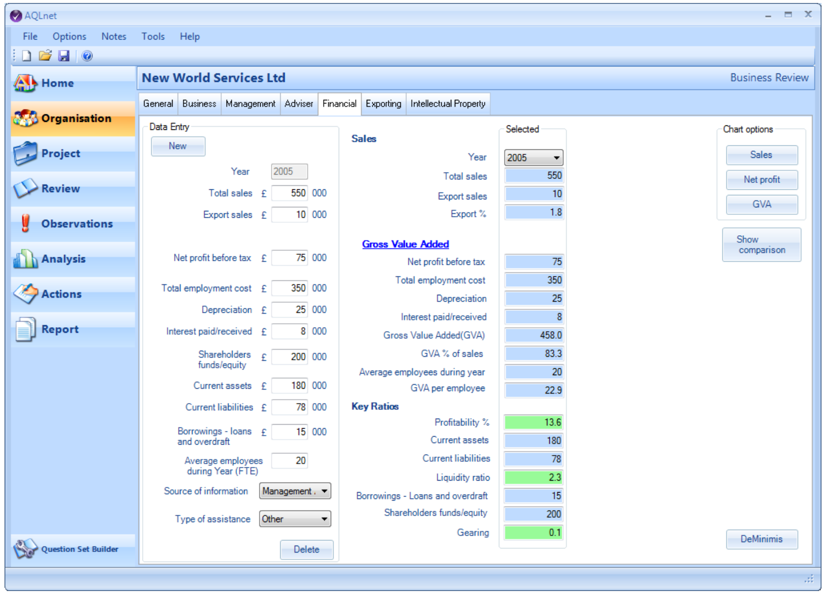


3.5 Financial tab

The Financial tab is used to gauge the basic financial status of an organisation and to measure the economic impact of the organisation on the local economy by measuring gross value added (GVA).

To added data for a new year click 

Key Ratios and GVA are shown in the right hand display area. The definition of terms used in the Financial tab is shown in Table 1.

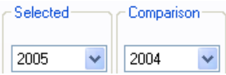


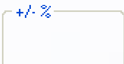
Last Year Proactive %: This is the % of total sales that arose from proactive exporting. This value cannot be greater than the export % and if it exceeds 10% of the total sales the organisation is not a new exporter	**Total Employment Costs:** This includes wages, salaries, directors' drawings, NI contributions (employment taxes) and pension costs
Depreciation : Depreciation of intangible assets may be referred to as amortisation	**Interest paid/ (received):** Net any interest paid and received. Net interest received is entered with a minus (-)
Gross Value Added: This is the sum of Net Profit before Tax, Total Employment Costs, Depreciation and Interest paid/ (received). It is the impact that the business has on the economy	**Average Employees during the year (FTE):** FTE stands for Full Time Equivalents. Part time employees count as part of a FTE employee, i.e. someone who works for half a week is 0.5 FTE
GVA per employee: This is a key measure of productivity. Benchmark values can be obtained by using the "Domestic and international benchmarks" hyperlink. High GVA per employee values indicate that the business exploits its intangibles and is a strong indicator of international competitiveness.	**Profitability:** This is ratio of net profit before tax to total sales. Strong profitability ensures that organisations generates the money that it needs to invest in growth and to repay borrowings
Current Assets: This value will be shown on the balance sheet. It is the total of stocks, debtors and any cash. These are the assets in the business that are either cash or will become cash in the relatively short term	**Current Liabilities**: This value is shown on the balance sheet as "Creditors amounts falling due within one year". It is trade and other creditors, overdrafts and any loan repayments due within twelve months. These are the liabilities that will have to be settled in the relatively short term
Liquidity Ratio: This is the ratio of current assets to current liabilities. If this is less than one then the liabilities that have to be settled in the short term are greater than the cash that will be available. In these circumstances there is a distinct possibility that the business will be experiencing cash flow difficulties and that the time of key people will be taken up from day to day in dealing with this	**Borrowings loans and overdrafts:** This will have to be calculated from the balance sheet and supporting notes. Loan repayments due within 12 months and overdrafts will be included in "Creditors amounts falling due within one year" and remaining loans will be included in "Creditors amounts falling due after more than one year"
Shareholders funds/equity: This will be shown on the balance sheet. In almost all cases this will be the balance sheet total that is used to assess SME status	**New exporter:** A new exporter is defined as a company having a proactive export turnover not exceeding 10% of total sales and a total export turnover not exceeding 25%
SME: SME status is based on employment, sales and balance sheet total. Loss of SME status only occurs if the thresholds are exceeded over two consecutive financial years	**SME Employment:** An SME employs less than 250. Students, apprentices and people on maternity leave may be excluded from the headcount
SME Sales : An SME has annual sales of less than 50m euros (£33m)	**SME Balance Sheet:** An SME has a balance sheet total less than 43m euros (£28m)
Type of assistance: This indicated the intensity of government support	

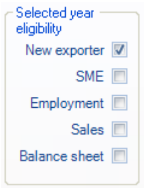
Table 1: *Financial definition of terms*

With data for more than one year recorded a comparison between years can be made.

Click on 

then select the years to be compared 

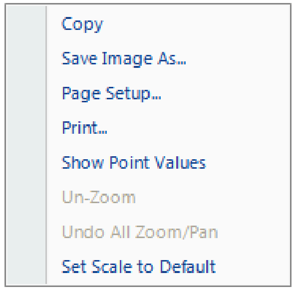
The percentage difference between the selected year and the comparison year is shown in the column headed 

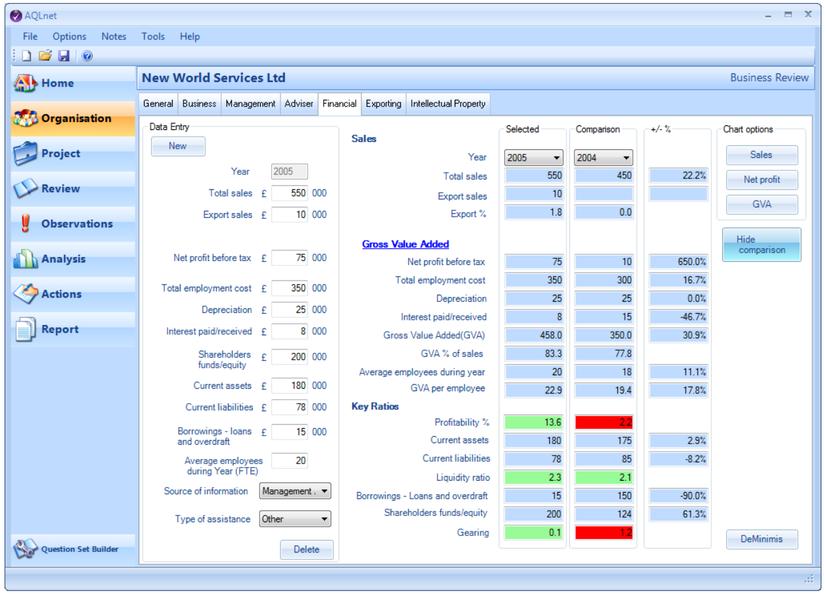


The Selected year eligibility panel provides check boxes to record whether the organisation meets the definition of an SME based on employment, sales and balance sheet, and if it is a new exporter or not.

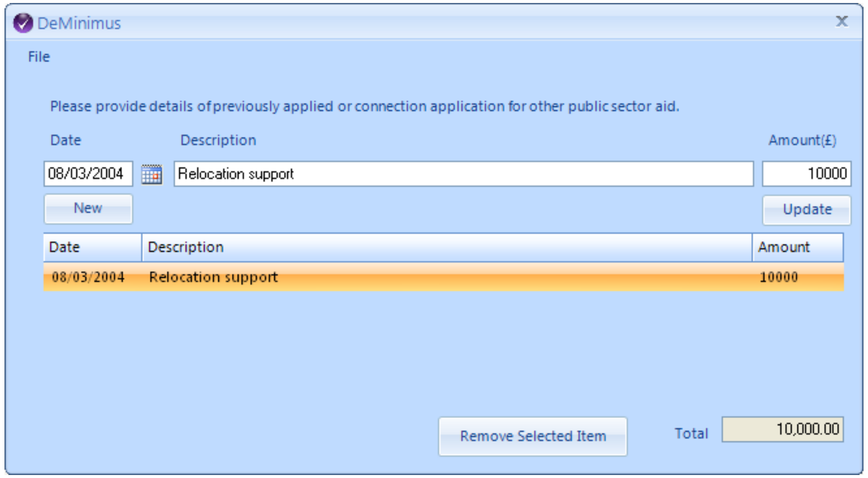
The Chart options panel allows the financial data to be viewed graphically. Click from 'Sales', 'Net Profit' or 'GVA' display the chart.

Right click on the chart to view a further list of ch art options.





To record previous support that the organisation has received click DeMinimus . Click New . Enter details on support received.

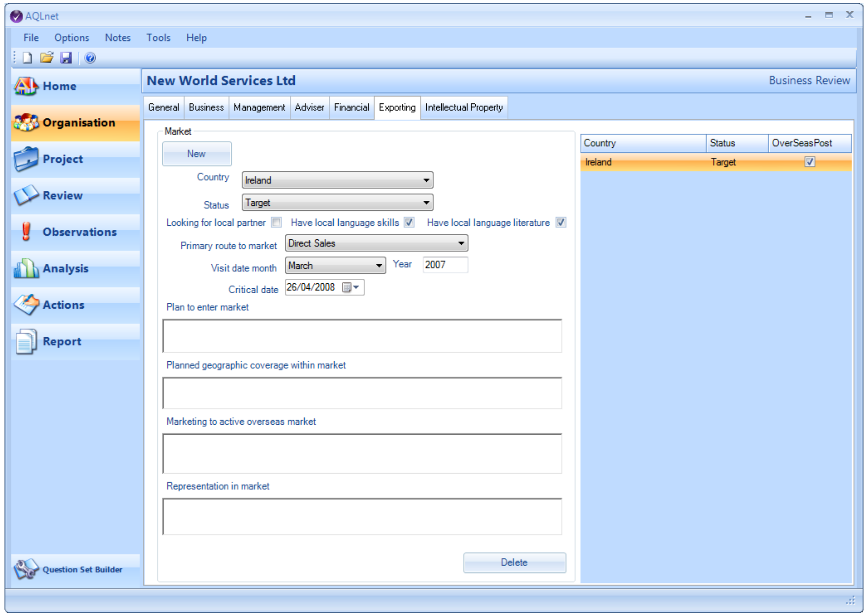


3.6 Export tab

This tab is used to record data associated with exporting activity.

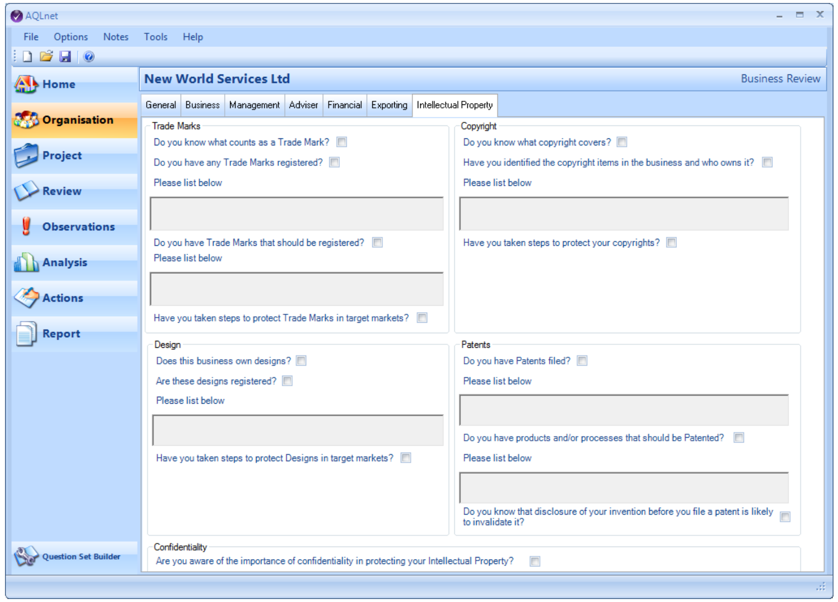
To add data click New .

Select the country from the drop down list then from the Status option select whether this country is a current export location of a target location. For target location further data may be recorded of planned visits and how business in the target market is to be won. The country is added to the list of target/current export countries.



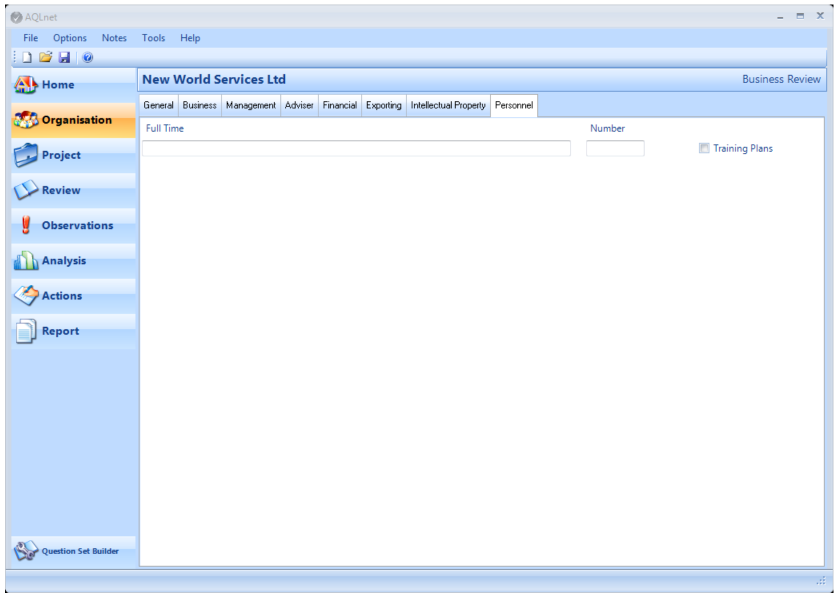
3. 7 Intellectual Property

The organisations status with regard to Intellectual Property is recorded here.



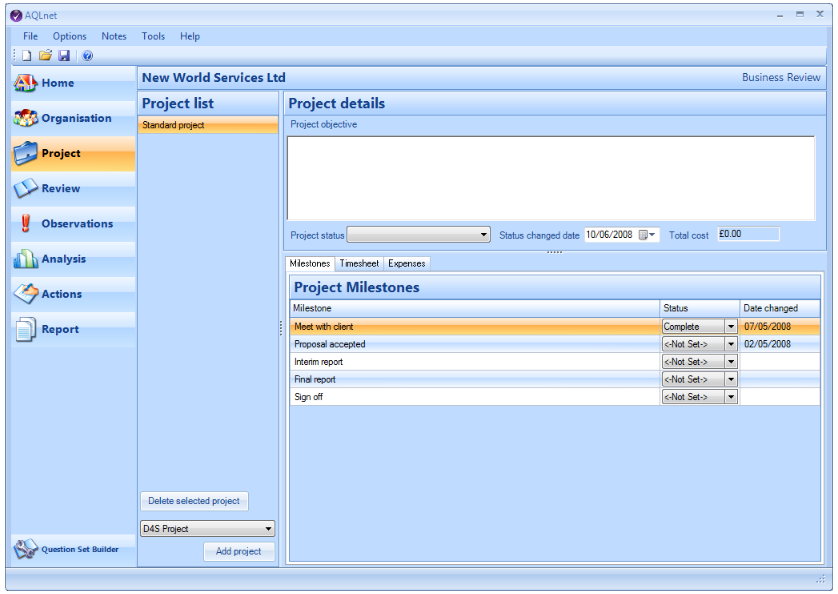
3. 8 Custom tab

This tab is used to record data on custom fields. You may define up to 10 text, 10 numeric and 10 check boxes. The title of the tab may also be customised (see section 13.1.6)



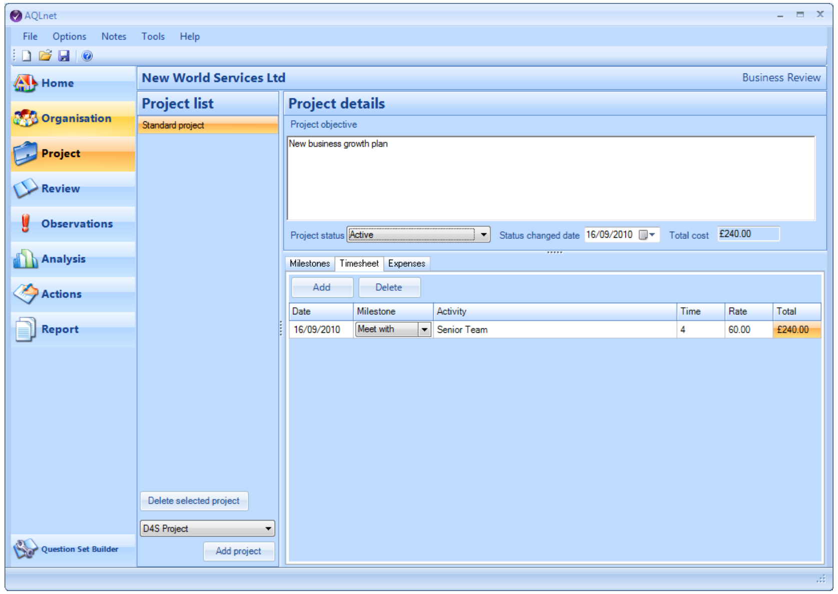
4. Project

The Project module is used to assign projects to an organisation and to maintain the status of project milestones. The left hand side of the display shows assigned projects. To add a new project to the organisation click the drop down button and select from the list. To maintain the status of milestones in a project and to add comments on the project select the project from the list in the left hand display. The milestone and its status are shown in the right hand side edit area.



4.1 Creating new projects

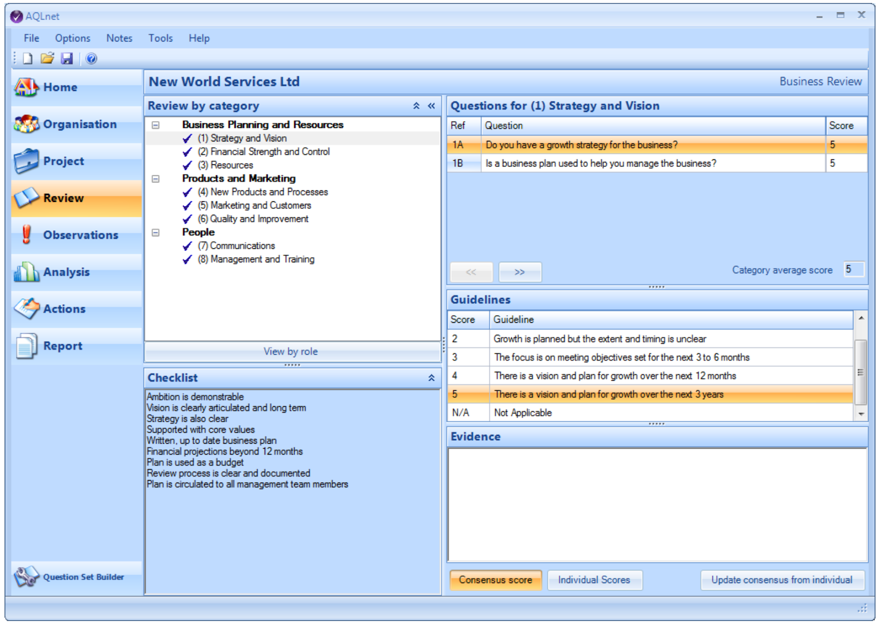
To create new projects see Project Maintenance section 13.3

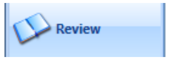


4.2 Recording Time and Expenses costs

To record Time and Expenses against a project milestone click the Timesheet or Expenses tab. For time recording select the milestone and enter a description of the activity followed by the time spent and the unit cost (a default unit cost may be set in the Language and Regional tab of Settings), the total cost is calculated. For expense enter the expense description followed by quantity and unit cost.

5. Review



The Review 

module is used to record scores against a set of questions on a specific topic. AQLnet can hold any number of question sets. Before beginning the review section the required question set should be loaded for the question set library. The display area has five sections.

Review Sections	A tree display of the question set. Click the category to view the questions
Checklist	A list of points that should be considered when answering the question is the selected category
Questions	The questions to be scored
Guidelines	The valid scores for the selected question
Evidence	A description of the evidence that supports the selected score

5.1 Review actions

To score a question click the question to highlight it then click the guideline which best describes the situation for the organisation. When all the questions in a category have been scored a  appears against the category in the Review Sections panel. Evidence to support the score can be entered in the Evidence box. To move to the next questions click the tree view or use 

. When all questions have been scored the Actions module may be accessed.

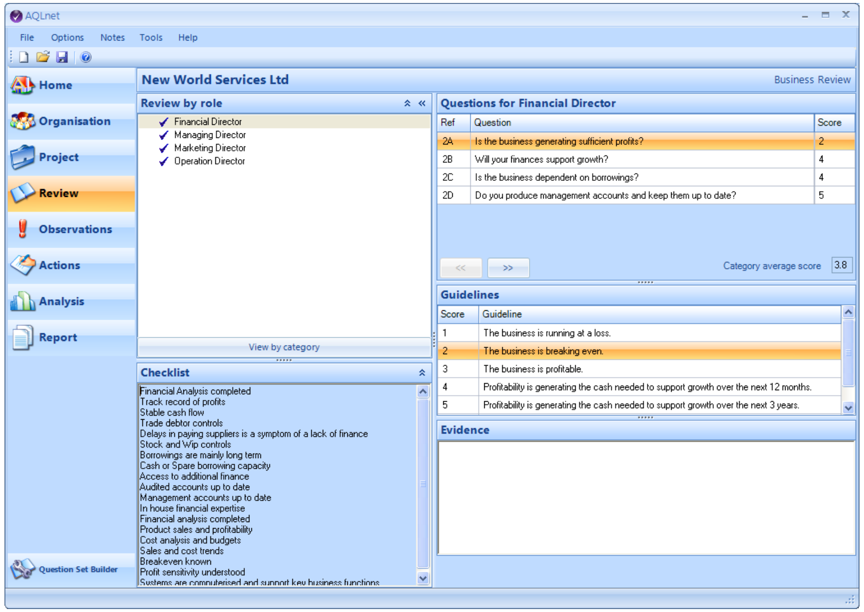
5.2 Individual scoring

When the members of the management team have been entered in the organisation module (see section 3.4) individual scores may be recorded for each member. Click Individual Scores to activate the individual scoring options. From the drop down list that appears next to the navigation buttons select the individual whose scores are to be recorded. When scores for a number of individuals have been recorded the consensus (average) score may be updated by clicking Update consensus from individual . Notes on consensus scoring:

1. Consensus scores are round down to the nearest while number e.g. 3.1 and 3.9 are both shown as 3
2. Consensus scores may be amended away from the average without change individual scores.
3. To view the actual average value of the consensus run the Individual scores report.

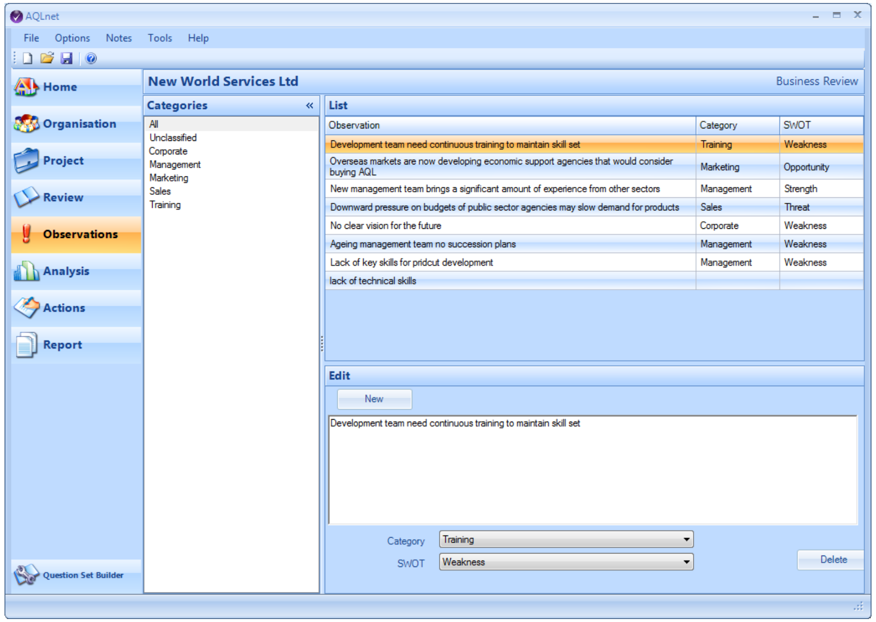
5.3 Scoring by role

Individual questions may be assigned to a specific role e.g. Financial Director using the Question Set Builder (see section 14.4). When roles have been assigned to questions the option to view questions by role or category is shown.



6. Observations

Observations

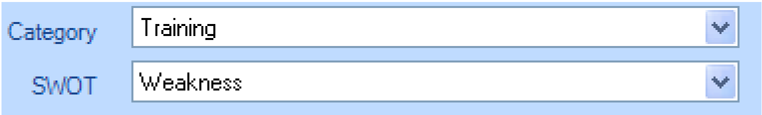


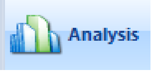
The Observations module allows points to be captured for action planning that may not be covered in the formal Review section. It can also used to add issues for action planning during the course of a project. Issues may also be created using the Notes facility (see section 2). The display area sections are:

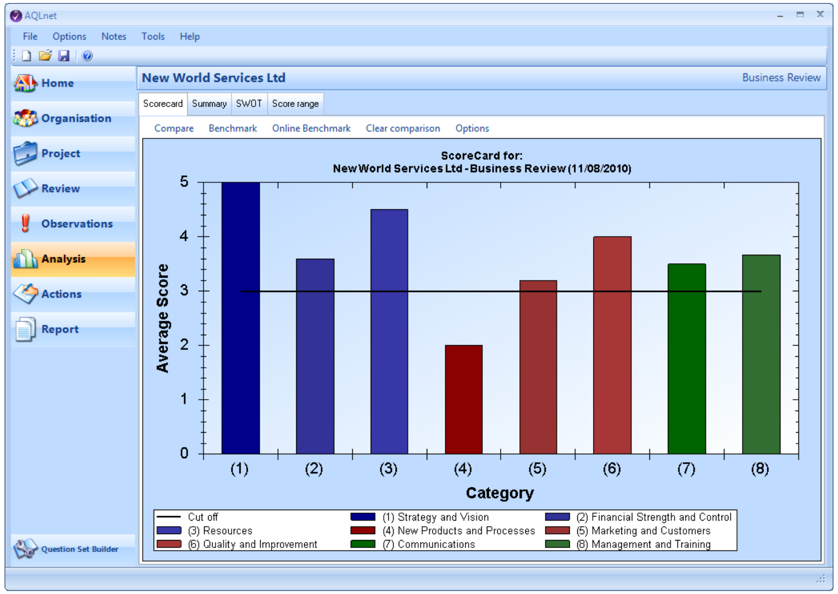
Categories	A tree view of the categories to which recorded issues have been assigned
List	The list of recorded issues
Edit	Input section for new issues and modification of existing issues

6.1 Recording Observations

To enter an issue click New Issue . Type the issue in the input box then classify the issue by selecting from the Issue category drop down and the SWOT Category drop down list.

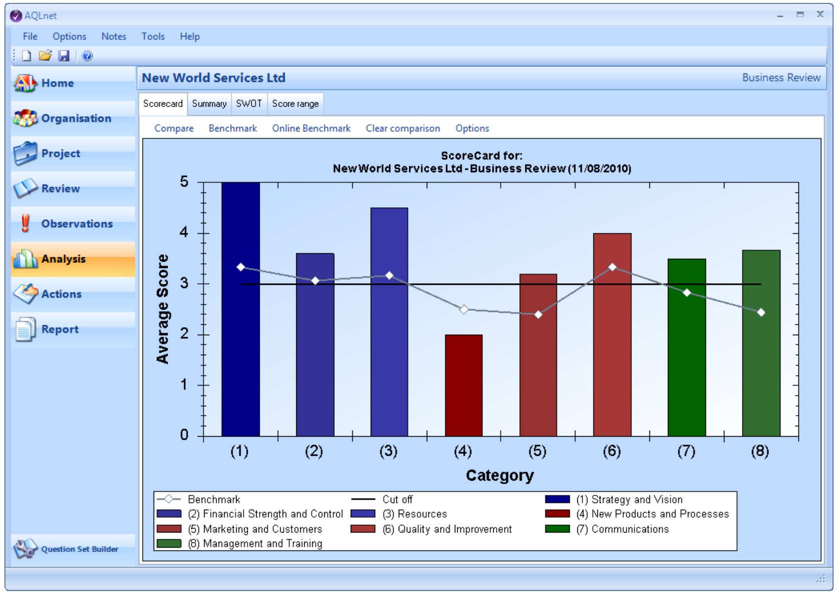


7. Analysis 



The Analysis section is a graphical display of the Review section scores and allows comparisons to be made between organisations and against an average score (benchmark). Under the Scorecard tab is a histogram of the average score for the question set categories. The dark to light shading for a colour represents categories that belong to the same question area. The black line represents the question set cut-off value. Categories below this line are considered potential weakness and priorities for action.

7.1 Comparing scores

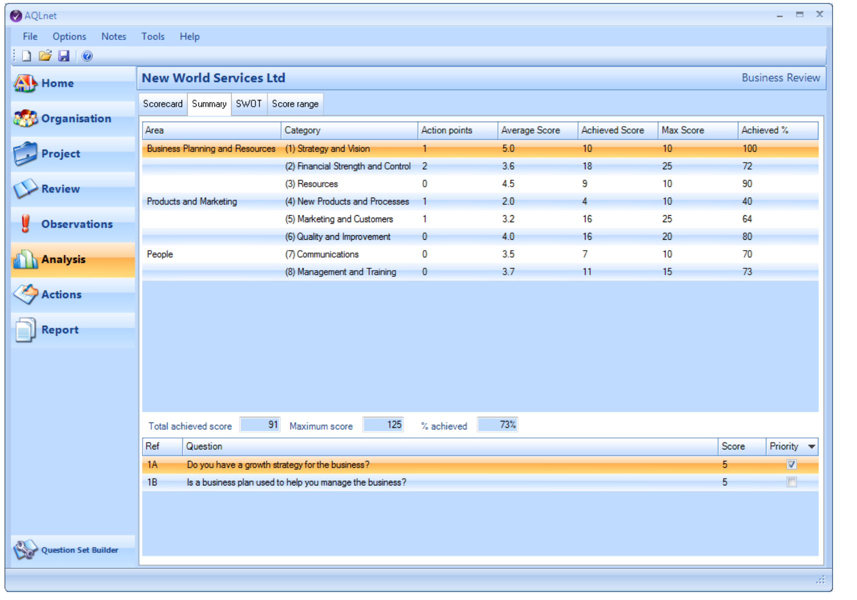


The scorecard options are:

Compare	Comparison with another organisation’s score or a different session for the same organisation
Benchmark	Comparison with the average score for all organisations that have completed the review
Clear comparison	Hide the compare display

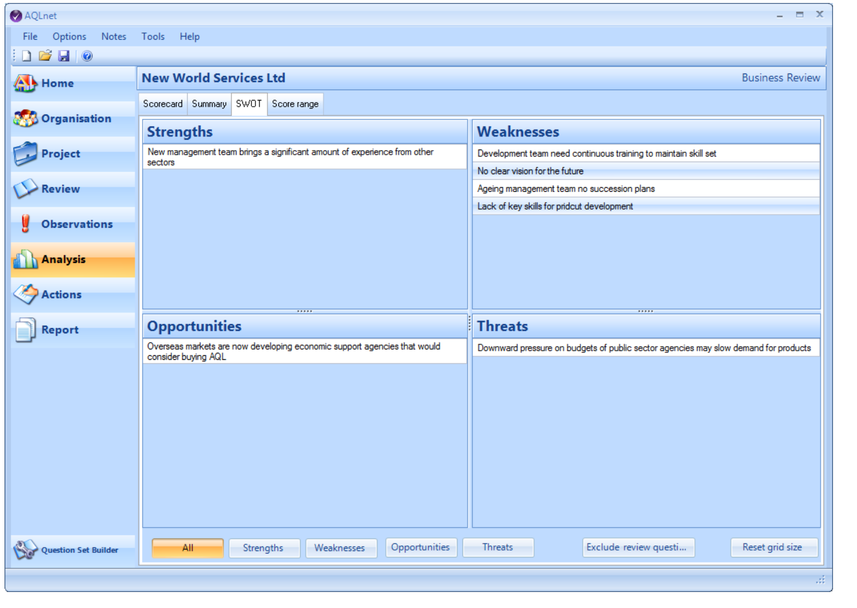
The benchmark scores are average for a question set and for a questions set and SIC.

7.2 Analysis summary



Under the summary tab is a tabular display of the review scores showing the percentage score achieved in each category. Listed in the lower part are the questions for that category. The questions with a score below the cut off value are marked as priorities. The priority flag may be removed or added. Those questions marked as priorities are available for action planning.

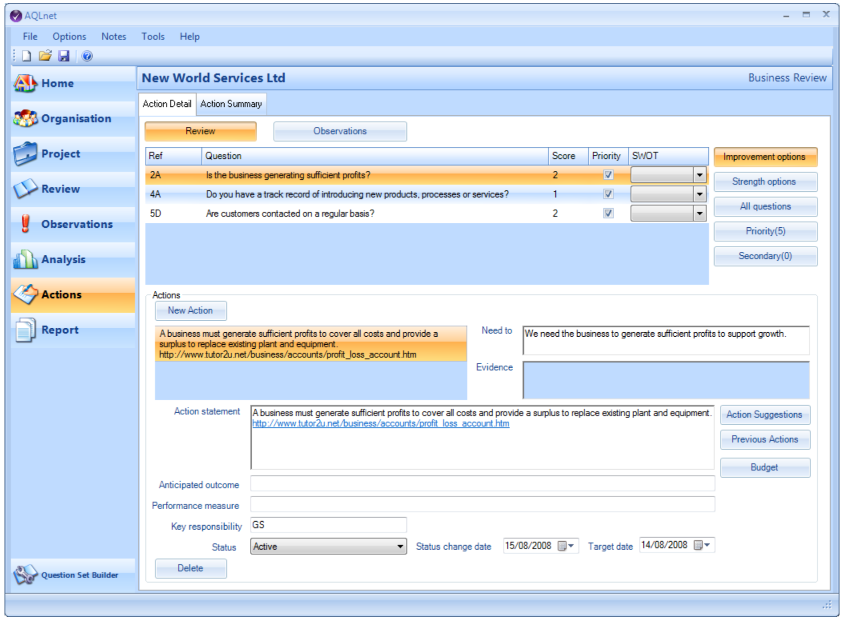
7.3 SWOT Analysis



Under the SWOT tab is a display of the categorised observations and any of the review questions classified in the Actions section. When a question has been defined as a strength or opportunity the question statement is displayed, when defined as a weakness or threat the need to statement is shown. The buttons at the foot of the display allow the sections be enlarged.

8. Actions

The Action module is used to create an action plan from the results of the review and from recorded issues. The action plan may be based on building on strengths or addressing weaknesses or a combination of both. Action plans are created for the priorities from the review section then for the priority issues. Once an action plan has been created it may be maintained through the Action Summary.



8.1 Review actions

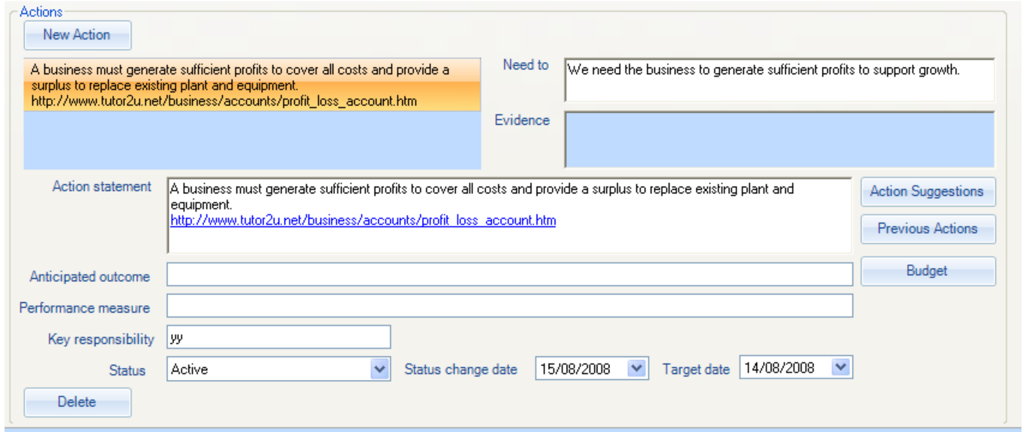
Under the Action Detail tab click on Review . Listed are the results from the Review module. The default is all questions scoring below the question set cut-off score are automatically made a priority. To change a question status check or uncheck the Priority box. Questions may also be categorised for inclusion in a SWOT analysis.

Score	Priority	SWOT
2	☑	Weakness

Action may be created for other question by selecting one of the following options.

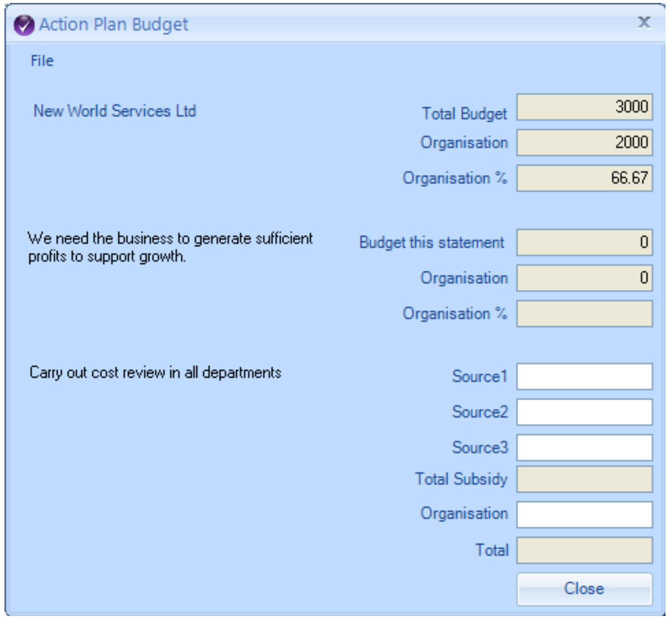
Improvement options	List all questions that have scored below the cut off score for the question set use during the review section
Strength options	List all questions that have scored above the cut off score for the question set use during the review section
All questions	List all questions for the question set use during the review section
Priority	List all questions that have been flagged as being a priority
Secondary	List all questions that are not flagged as a priority

To add an action click on New Action



In the Actions panel enter details of the action to address the issue. The 'Need to' statement may be edited by clicking into the text box.

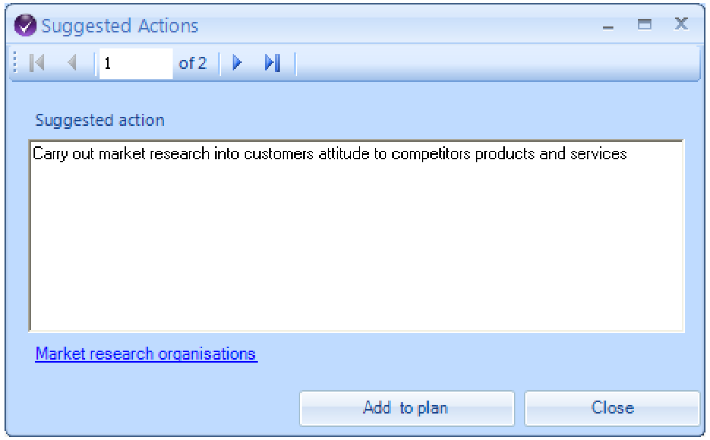
To add budget data for the action click Budget . Funding for the action can be allocated to three different sources as well as the organisation (see 11.1.4 on how to set budget labels). The budget window shows the total budget for all the action to address the issue and the overall budget for all issues.



8.2 Actions suggestions

Action suggestions are pre-defined actions to address the issue (see section 14.4 on creating action suggestions). Click Action Suggestions The action suggested window is displayed. Where there is more than one action suggestion use the navigation panel 1 of 2 to view the next suggestion.

Click Add to plan to add the suggestion to the action plan.

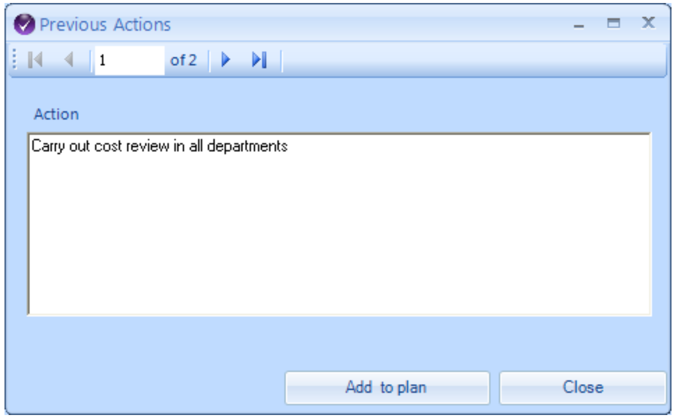


8.3 Previous actions

Actions created for use with a different organisation may be used with the current organisations.

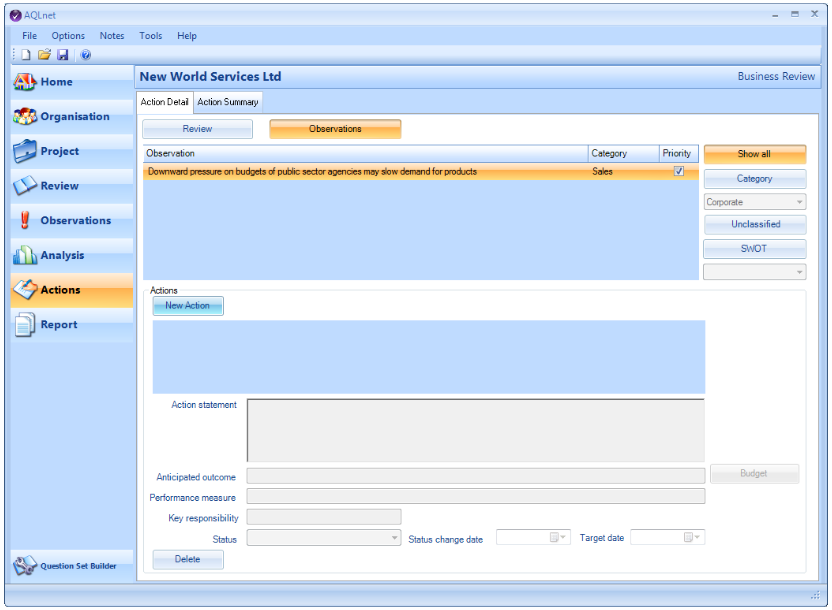
Click Previous Actions The top 20 actions used with other organisations for this issue are shown

Click Add to plan to add to the action plan.



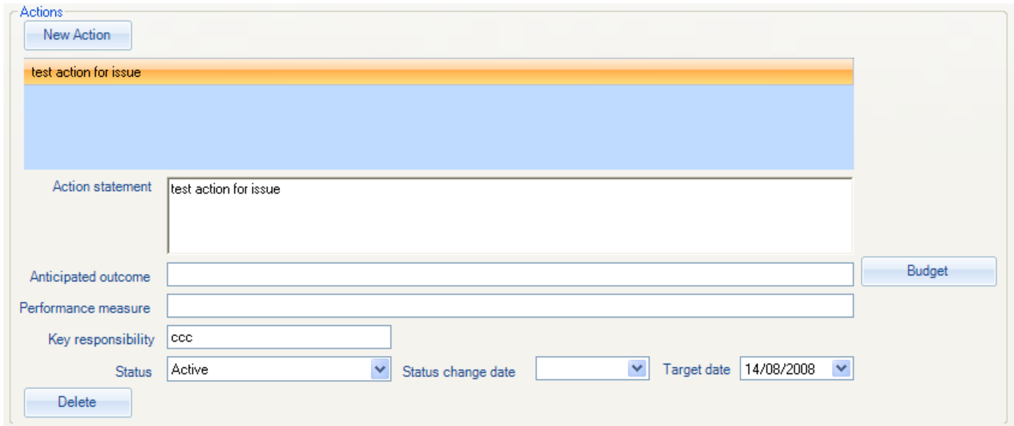
8.4 Observation actions

Under the Action Detail tab click on [Issues]. The displayed issues may be changes using the following options.



[Show all]	List all observations
[Category] [Education]	List observations belonging to the selected category
[Unclassified]	List unclassified observations
[SWOT] [Strength]	List iobservations belonging to the selected SWOT category

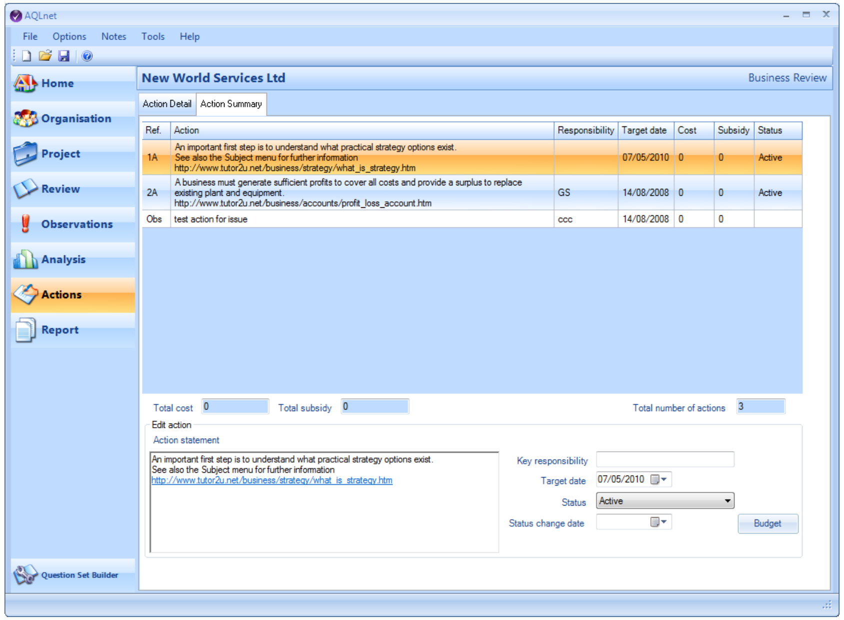
To add an action click [New Action]. In the Actions panel enter details of the action to address the observation. To add budget data for the action click [Budget].



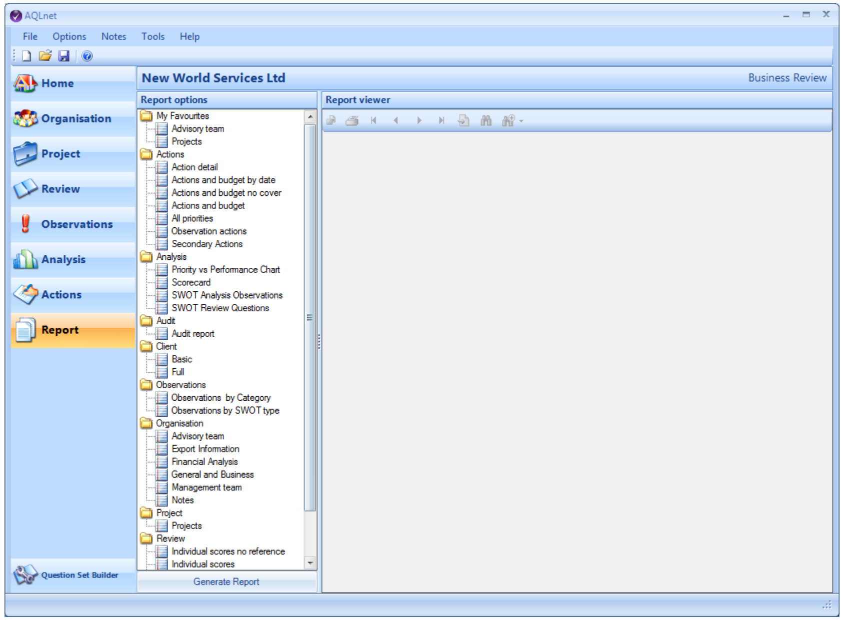
8.5 Action summary

Under the Action summary are listed all the actions. To modify the details on an action select the action from the list and edit the details in the Edit action panel.

To modify the budget details of an action click Budget .

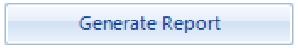


9. Report 



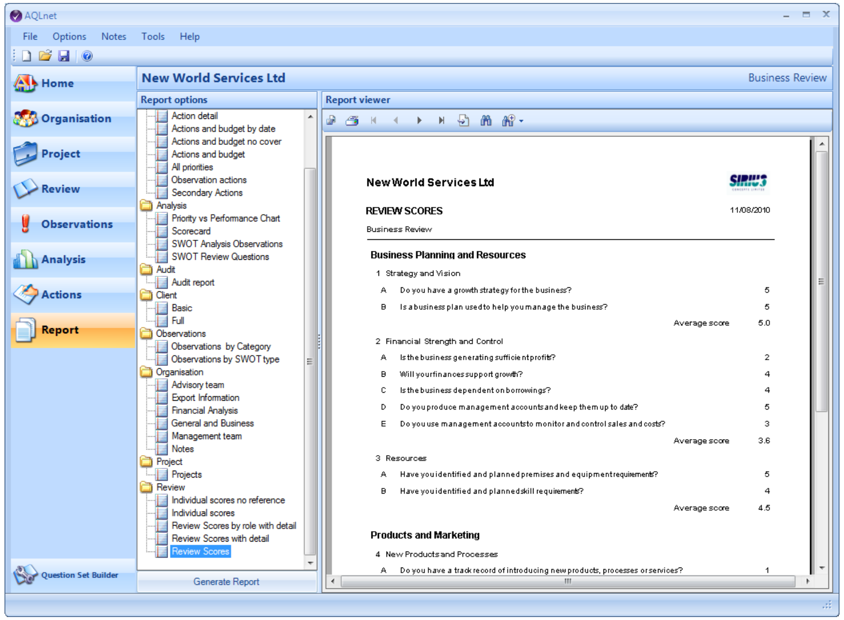
Available reports are shown in the report options pane. Click the folder icon to display the list of reports.

Double click the report description to create the report or select and click



Frequently used reports may be added to a ‘My Favourites’ folder by doing a right mouse click on the report to be added and clicking on ‘Add to favourites’

9.1 Print option

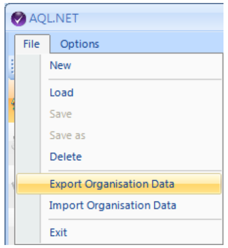


The report is shown in the Report Viewer. The following options are available.

	Export report in Adobe, Excel, Word or RTF format
	Print report
	Page through report
	Go to page
	Find text
	Zoom

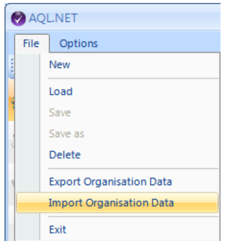
10. Data Exchange

Users working with an organisation that has implemented AQL Reporting Services can use that service to exchange review data. When AQL Reporting Services is not implemented data can be exchanged as follows.



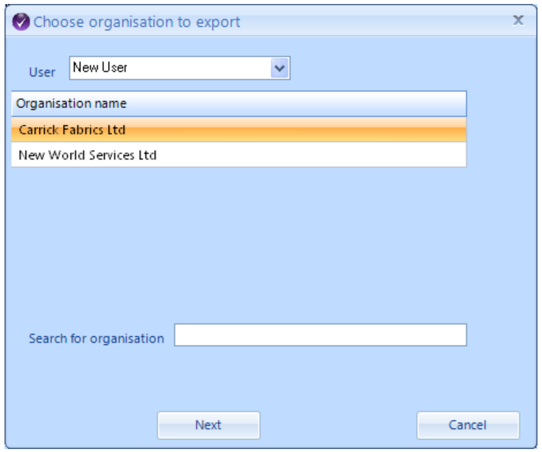
Step 1- Export to Data file

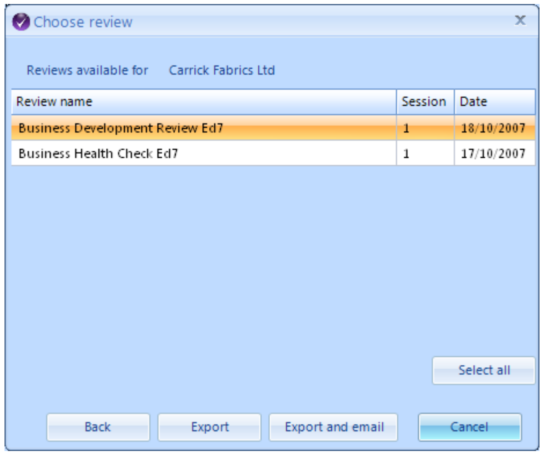
From the menu bar select Export Organisation Data. Select the required organisations from the displayed list and click Next . Select the review and click Export to create a data file in the default data file folder (see section 13.1) or Export and email to attach the data file to an email.

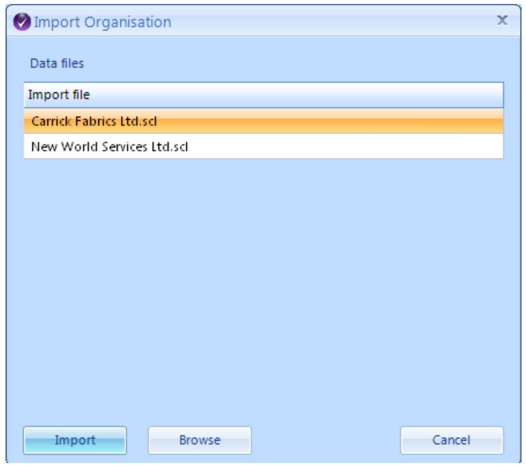


Step 2 – Import from Data file

Save received data file to the default data file folder. From the menu bar select Import Organisation Data files in the default data file folder are listed. Select the file required and click Import . The selected organisation is added to the database.

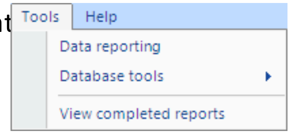


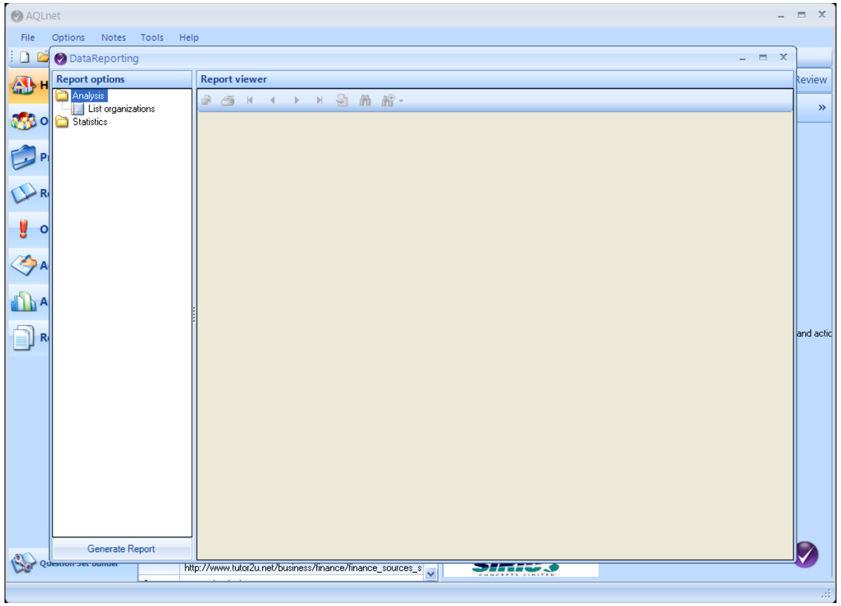




11. Tools

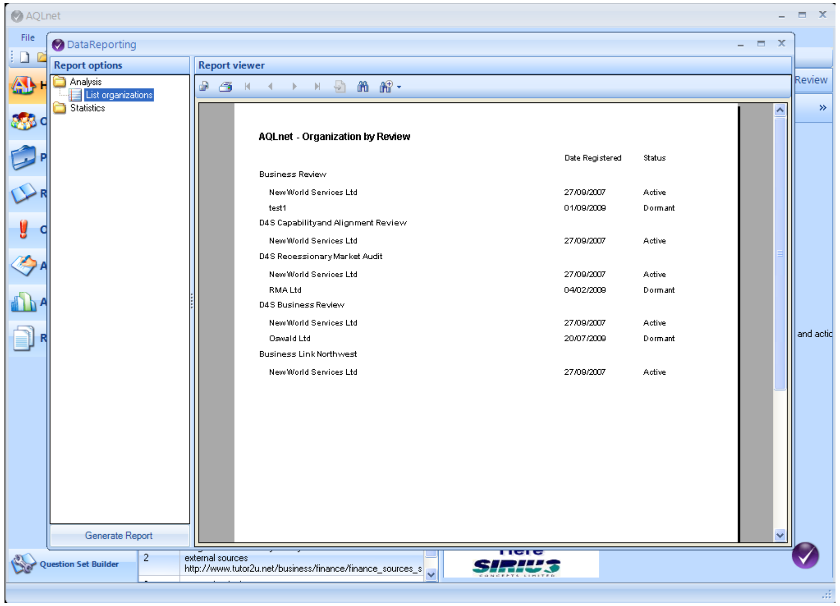
Use the options found under Tools in the menu bar to analysis data, view stored reports and to backup the dat





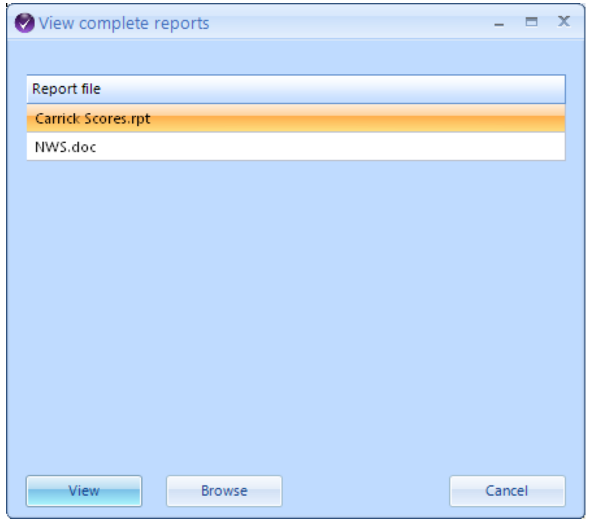
11.1 Database reporting

Database reporting provides summary and statistical reports on stored reviews. Reports are shown in a report viewer and may be printed or saved using the options described in section 9.



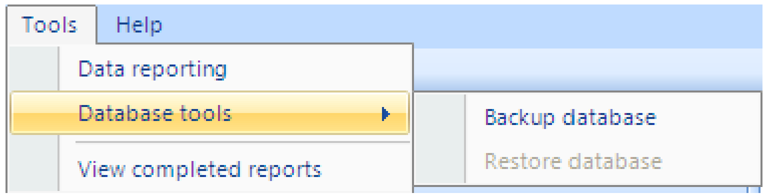
11.2 View completed reports

Lists reports exported from the Report module. To view select the report and click View .
Use Browse to view report save in another location.



11.3 Database tools

This option is used to backup and restored the AQLnet database.
The restore option is only operational when the application has been started and before any data has been entered or stored data loaded.

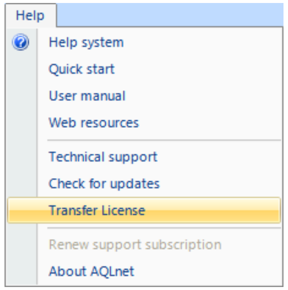


12. License

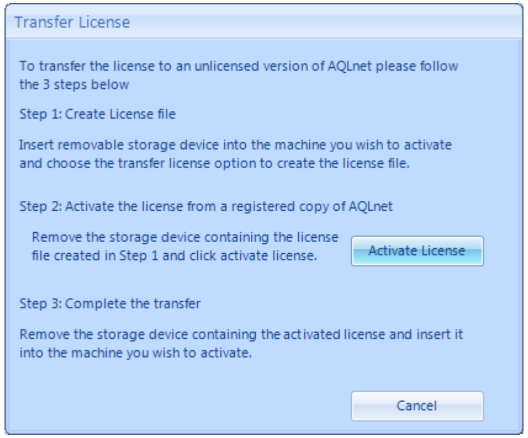
AQLnet is licensed per PC. A user may install the software on as many PC as they wish but require a license for each copy, however the license may be transfer from one PC to another as often as you wish.

12.1 Transferring a license

Use the Transfer License option found under Help in the menu bar.

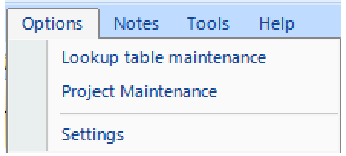


Install AQLnet on the PC that the license is to be transferred to then follow the instructions displayed.



Part II: Set up and Review Creation

13. Set up

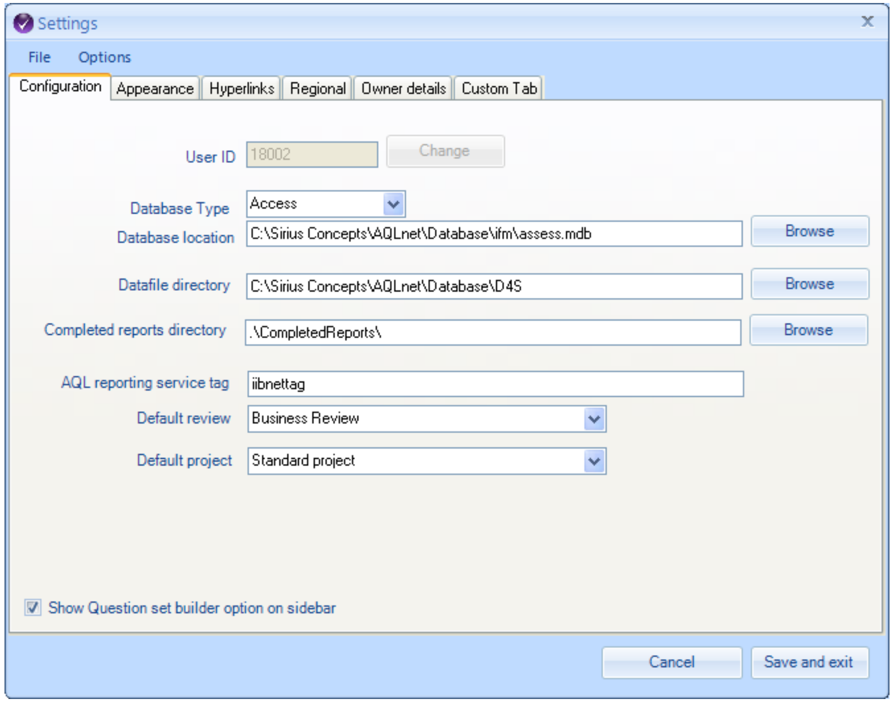


This section describes how to set up AQLnet to meet your preferences.

13.1 Settings

The following settings may be amended.

13.1.1 Configuration



User identify: Where more than one user accesses the same database and/or when a group of users are copying data to AQL Reporting Services then each user must have a unique id. When none of these conditions apply the default value of 2 should be used. Where an id number is required check you the system administrator what value should be used

Database Type: The database type may be set to either Access or SQL Server. SQL Server users should contact the system administrator for connection details.

Database Location: Applies only to Access databases and needs to be amended when database location is changed from that select during installation.

NB when connected to a different database for that select during the installation it is important to ensure that user id exists on the new database

Data file Directory: The default folder for exported data files

AQL Reporting Service Tag: Connection value for RS Service (see Part III)

AQL Online ID: Connection value for web system (see Part III)

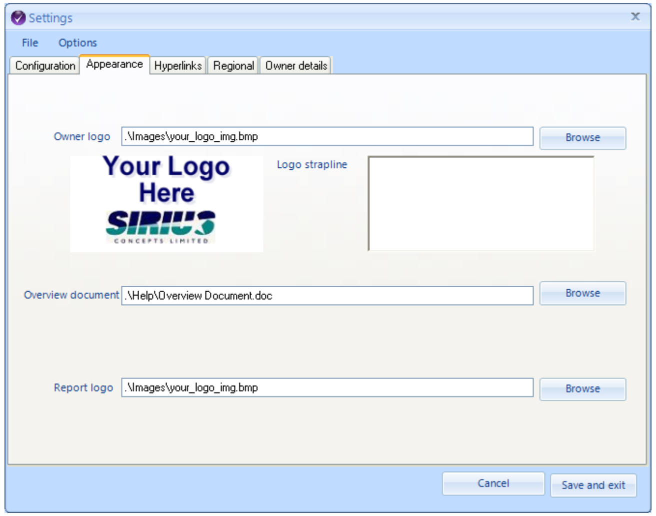
AQL Online url: Host of web system (see Part III)

Default review: Default review when new organisation is created

Default project: Default project when new organisation is created

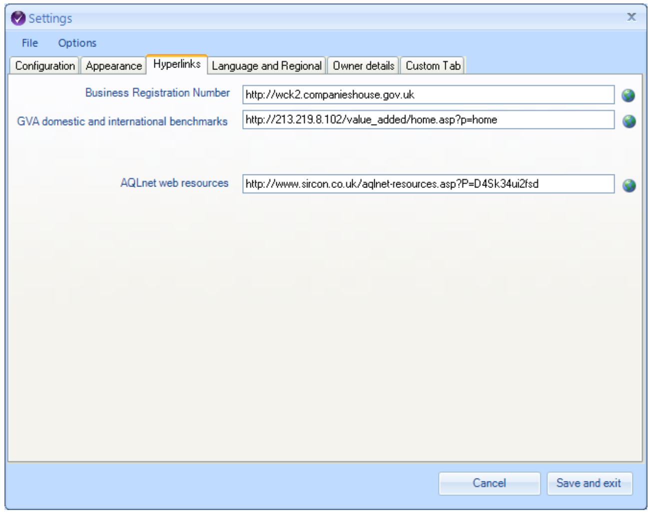
13.1.2 Appearance

Owner logo: Image to appear on Home screen (leave blank if no image required).
Logo strap line: Text to appear next to owner logo.
Overview Document: Document to be shown when is clicked in Home display organisation information panel.
Report logo: Image to appear in reports (leave blank if no image required). Only bitmap images (.bmp) are valid.

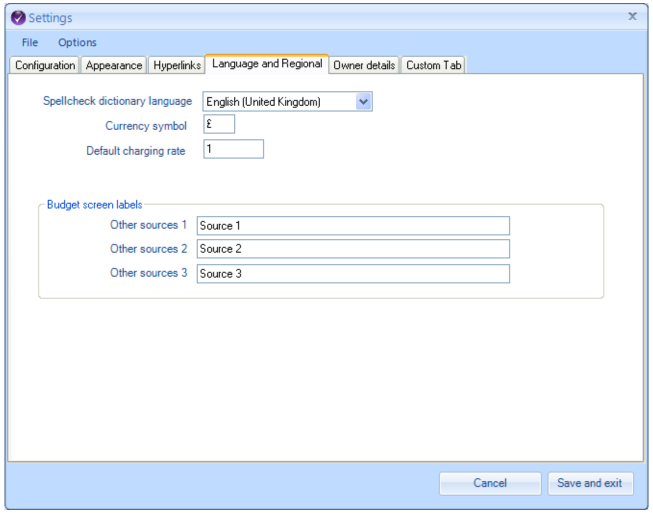


13.1.3 Hyperlinks

Enter the url of the information source to be shown when the described hyperlink is clicked



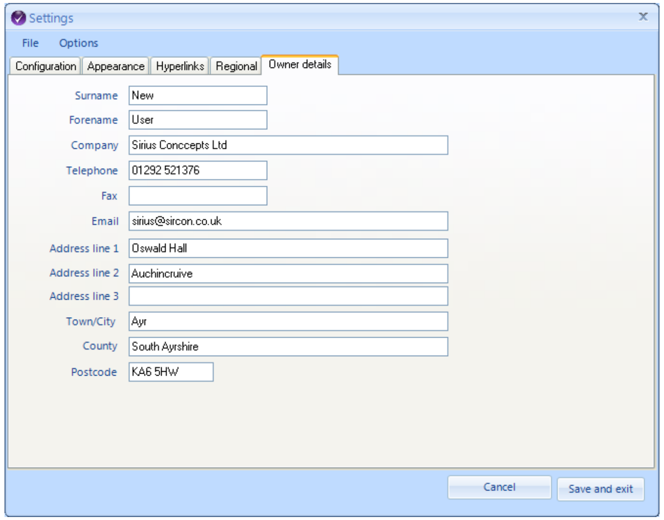
13.1.4 Regional



System region: Set the region for currency symbol and spelling dictionary
System currency symbol: Override the region setting
Spell check dictionary language: Override the region setting
Default charging rate: Unit value used by timesheet

Budget screen labels
Other source 1: budget label
Other source 2: budget label
Other source 3: budget label

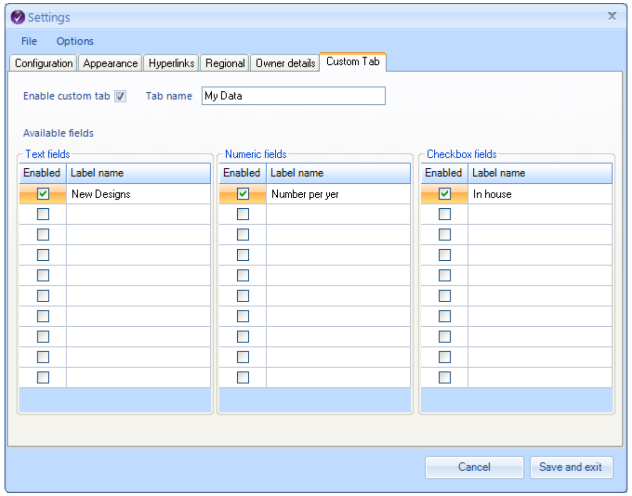
13.1.5 Owner Details



Information on owner of software

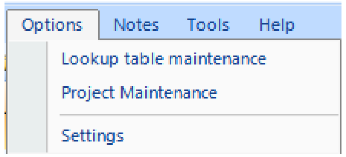
13.1.6 Custom tab

An additional tab will be displayed in the Organisation module if the enable custom tab box is checked. Define the labels to be used for up to 10 text, 10 numeric and 10 check boxes. To activate the fields check the box next to the label.

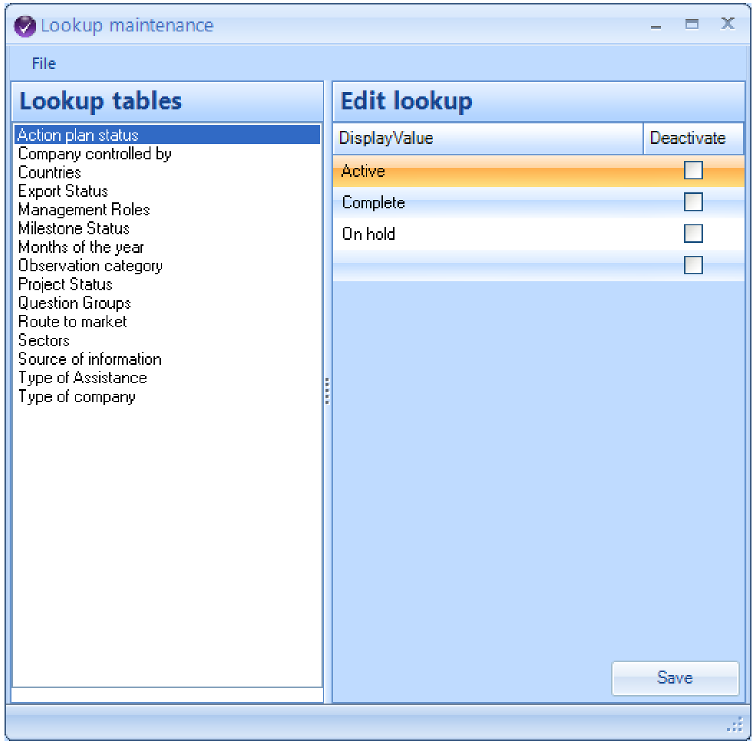


13.2 Look up tables

The Look up tables contain the data display when a drop down button is clicked.

To change the data shown in a drop down click on 

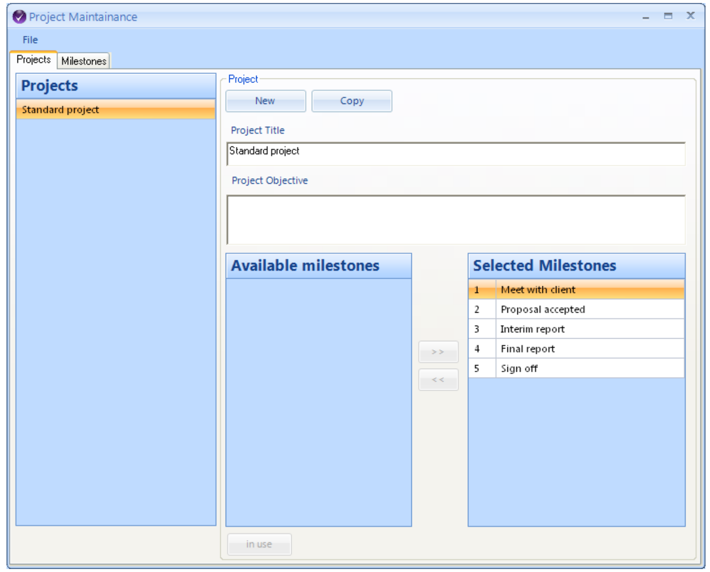
Select the table to be changed from the list shown under **Lookup tables**



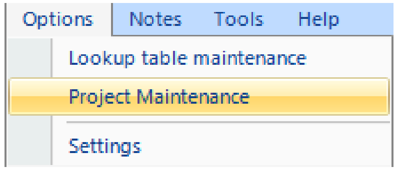
Add or amend the text in the column DisplayValue

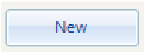
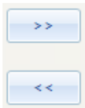
Click Save

13.3 Project Maintenance

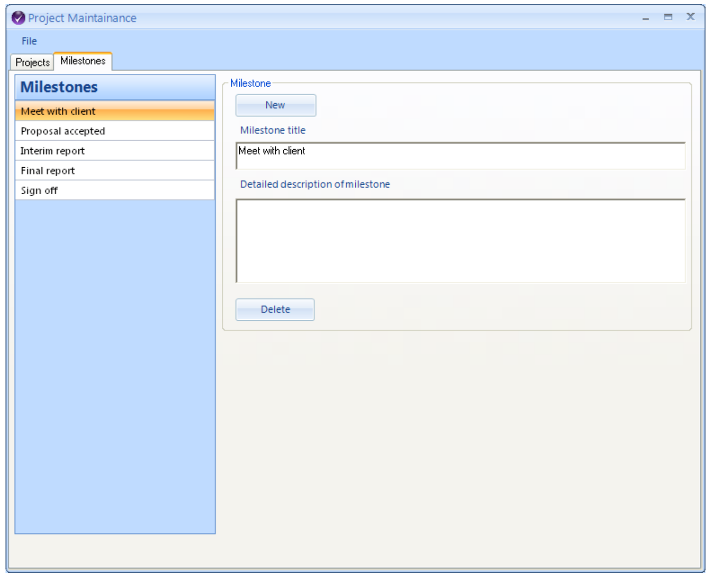


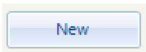
Projects may be added or amended using Project Maintenance.



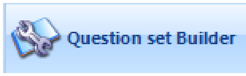
In the project tab click  . Enter a project title and description. Use the add and remove buttons  to assign milestones to the project.

13.3.2 Adding milestones



In the milestone tab Click  . Enter the milestone name and description. When complete the new milestone is available to add to new or existing projects.

14. Question Set Builder



A Question Set is a structured set of questions used in the Review section of AQLnet to determine strengths and weaknesses on a given subject. Ready made Question Sets are supplied with AQLnet or may be purchased independently. Users who wish to create their own Question Sets may do so using the Question Set Builder. A Question Sets can be constructed using existing questions from the Question Bank or from new questions.

14.1 Question Set Structure

Understanding the Question Set structure makes the creation of new Question Sets a simple task.

Question Set

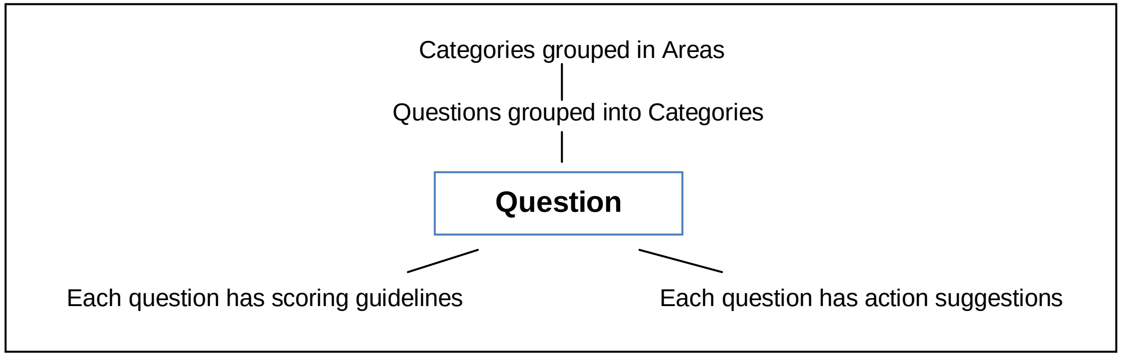


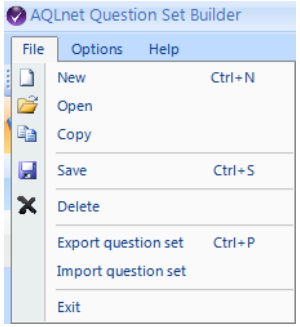
Table 2: *Question set structure*

Questions covering a specific subject matter are grouped into Categories which can in turn be grouped into Areas covering a general theme. Each question is supported with specific scoring guidelines. Suggested actions, for use when that question has been identified as one that needs to be addressed, may also be added outlining a course of action and pointing to information sources on the Web.

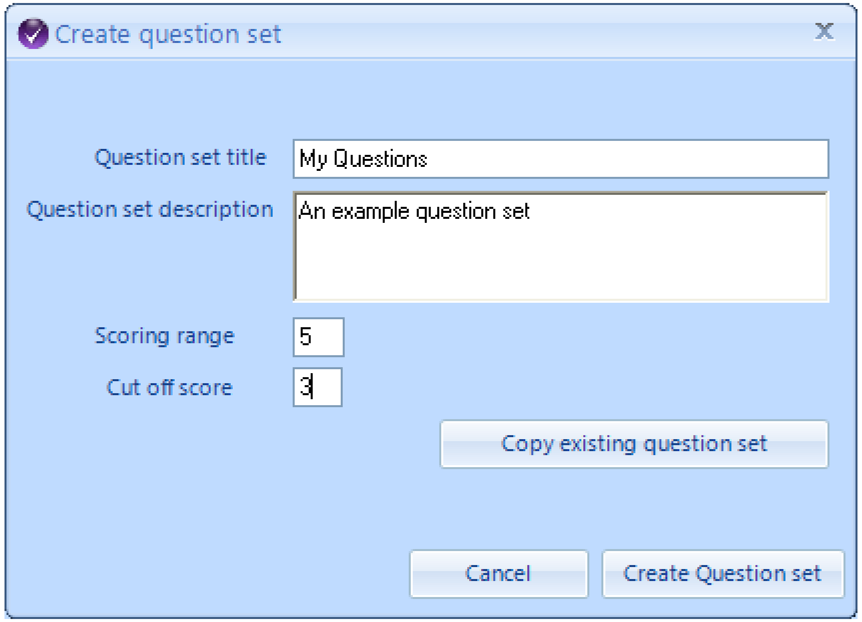
There is no practical limit to the number of Questions, Categories and Areas in a Question Set however there must be a least one Category and one Area per Question Set.

14.2 Creating a new Question Set

To create a new Question Set select File/New



Complete the new Question Set form.



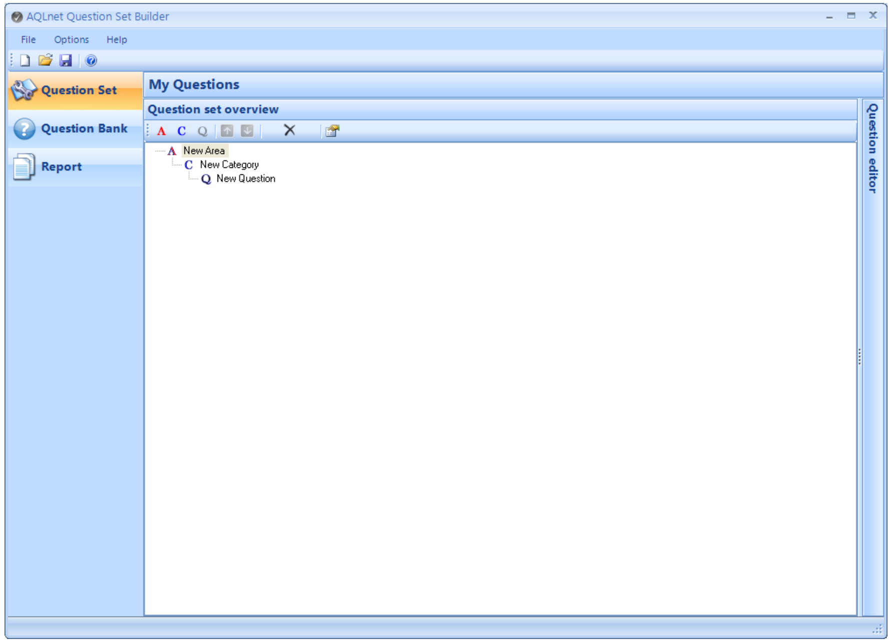
Question set title: The name the question set will be known by.
Question set description: A full description of the subject addressed.
Scoring range: The number of possible answers to a question.
Cut off score: The score below which a question will be regarded as a weakness and a priority for action.

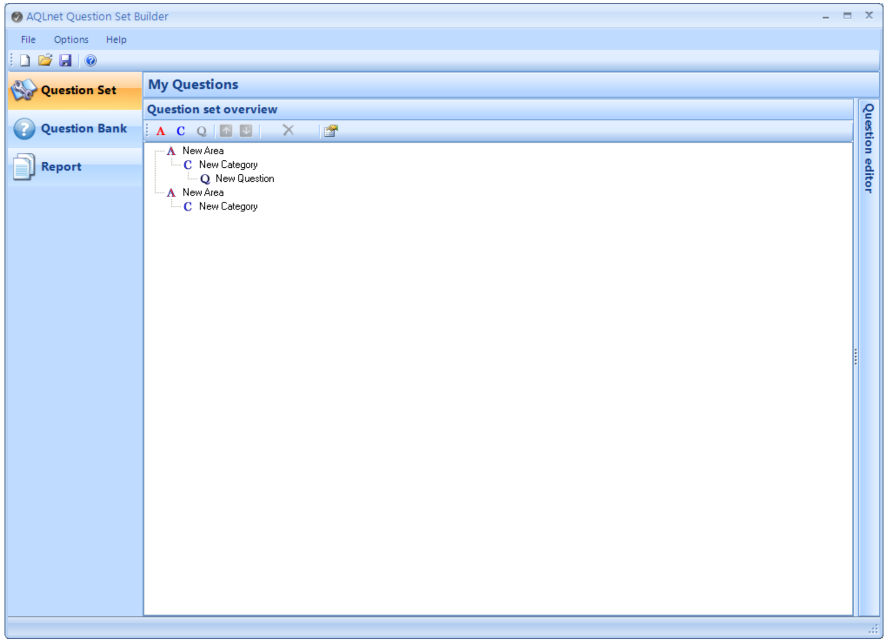
To display the Question Set maintenance options click Create Question set

The Copy existing question set button is used to amend a question sets while retaining the original. It is also used when a question set cannot be changed because an organisation has already completed a review against the question set.

14.3 Creating the question set structure

The steps in creating a new Question Set are to group questions into Categories then to group the Categories into Areas. Questions are assigned to a Category from the question bank or a new question can be created. An initial structure of one area, one category, one question is created for you. Add additional areas and categories by clicking on the A then categories by clicking C . As areas and categories are added the structure of the question set is displayed. Double click each node to edit the text or right click to access options. Drag and drop allows the order of modes to be changed.





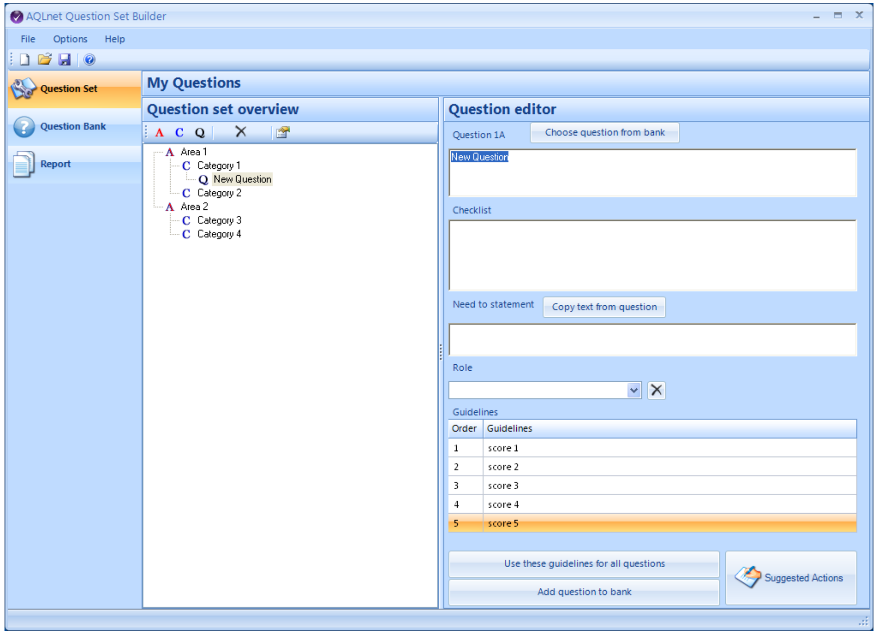
14.4 Adding questions and suggested actions

For each category click Q to add questions. The question editor is shown. Enter the question text followed by text (checklist) that gives guidance on how to score the question. The need to statement, if entered, will appear in the action planning section. The question may be assigned to a specific role, if this option is used the question list may displayed in role order in the Review section. Scoring guidelines for each value of the scoring range may be recorded.

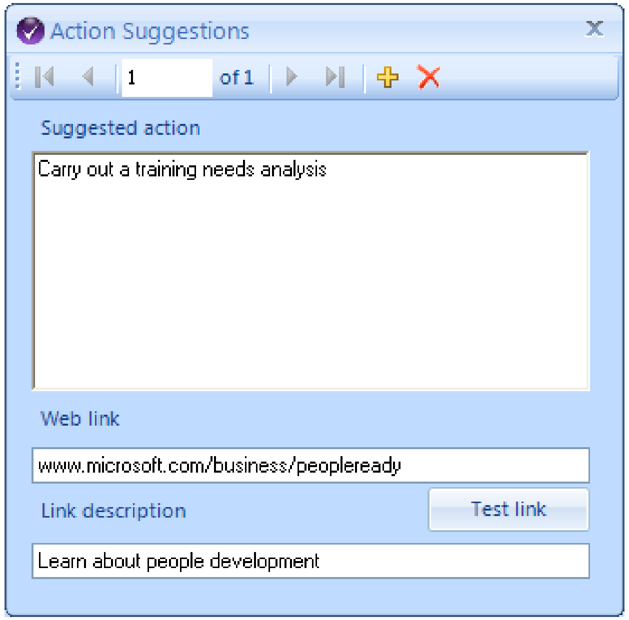
To add questions from the Question Bank click Choose question from bank
Then select the required question.

When a new question has been created you may add it to the Question Bank by clicking Add question to bank then selecting a question bank group.

To apply the scoring guidelines for one question to all the questions in the question set click Use these guidelines for all questions



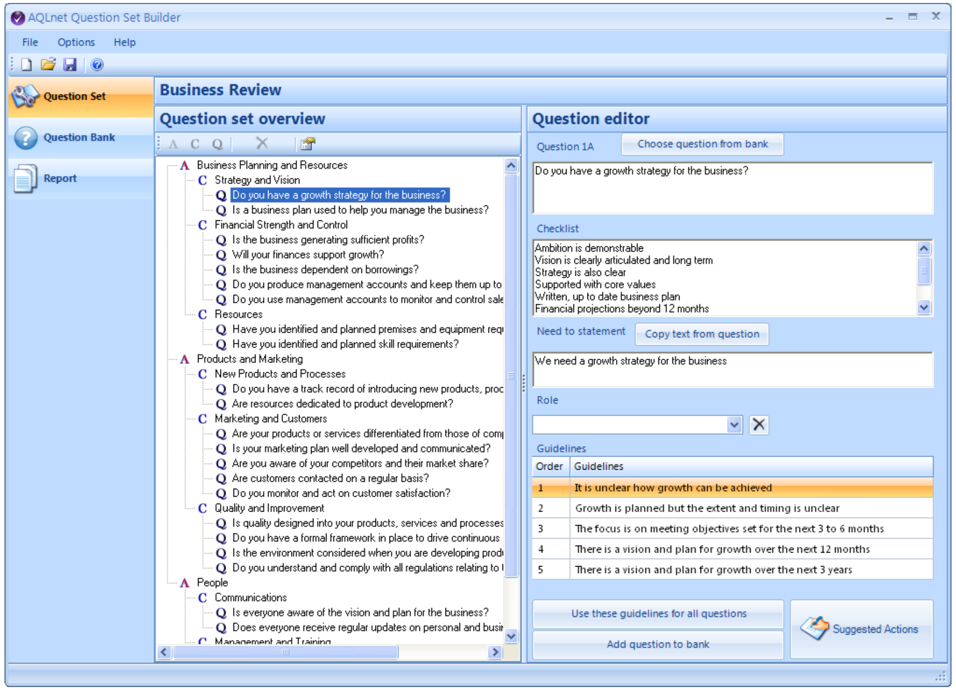
Suggested actions are activities which may be undertaken when the question is identified as a priority and included in an action plan. To add a suggested click the Suggested Actions icon. In the Action Suggestion window click to add a new suggestion. Enter a description of the action that would be added to an action plan. The suggested action may be supported by a link to an information source on the Web and the link description is the text that is used in AQLnet suggestion window, however the url is placed in the action to ensure that the reports show a valid link. Use Test link to verify that the web link is valid.



14.5 Modifying a Question Set

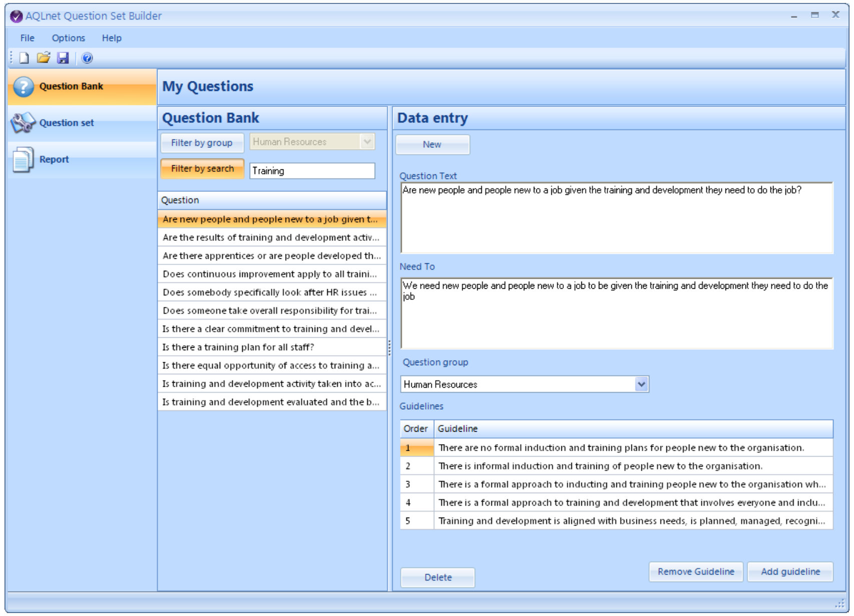
When results are held against a question set changes are limited to modifications of the text of Areas, Categories, Questions or Guidelines. New elements, Areas, Categories or Questions may only be added or removed from a question set that has no results held against it. To change a question set where results exist make a copy of the question set. Open the question set to be modified by selecting File/Open from the menu bar.

The question set is displayed in the Question Set overview. Use drag and drop to change the order of areas, categories and questions.



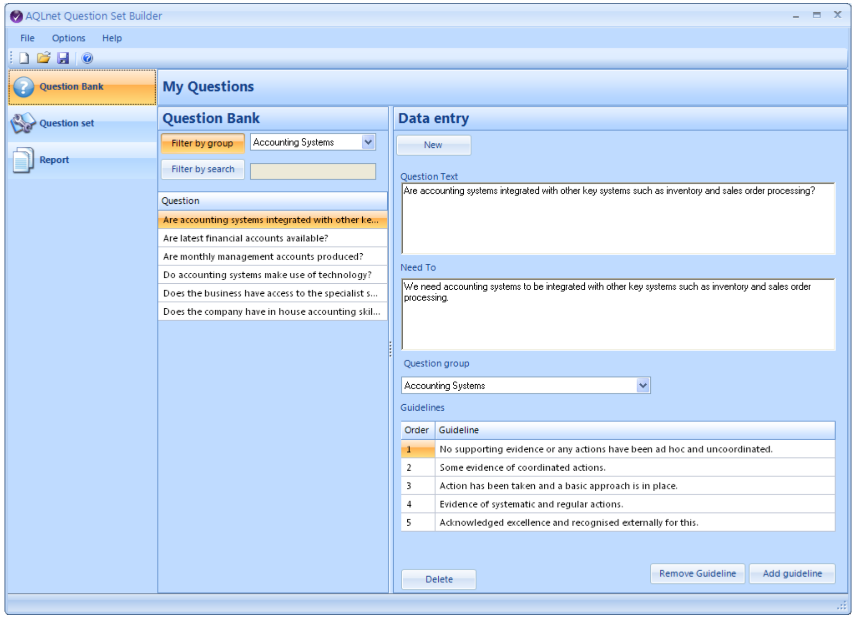
14.7 Question Bank

The question bank holds a list of questions, grouped by topic that may be used to create a question set. Questions in the bank may be used in several question sets. The question bank screen is the default display when the Question Set Builder is started. The question bank can be viewed at anytime by clicking on Question Bank To view questions in the bank use the Filter by group drop down option or the Filter by search option. The search option displays all questions which contain the search text.

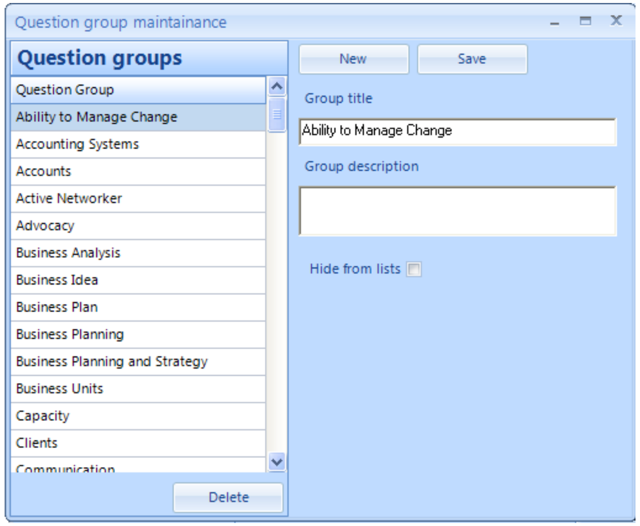


14.7.1 Adding questions

To add a question to the bank click New then enter the question text followed by the 'Need to' text. The 'Need to' text is the action statement that appears in the action plan when this question is identified as a priority. Add guidelines by clicking Add guideline . Guidelines describe the score assigned to the question in the Review process. The number of guidelines for a question is the same as the question set scoring ranges. When a question is added to a question set the number of guidelines per question will be limited to the question set scoring range.



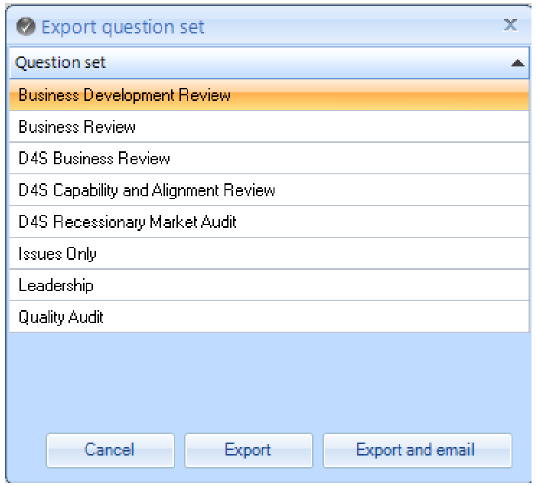
14.7.2 Managing questions



To move a question from one group to another select the question then on the question maintenance screen select the new group from the Question set group drop down list.

To create a new question group select Options/Question groups from the menu bar. Click New then type the group name and group description. Then click Save

14.8 Sharing Question Sets



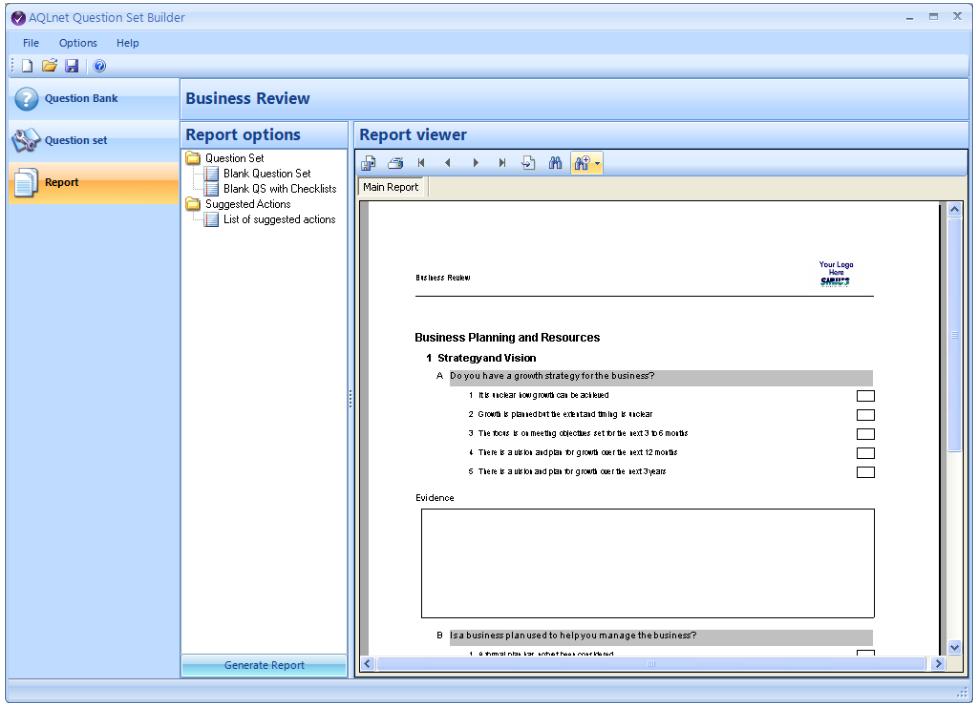
To exchange a question set with another user of AQLnet select File and Export question set. The question set is written to installation folder ReviewDataFiles or be emailed immediately by clicking Export and email review

To add a question set use File/Import question set and point to received data file.

14.9 Question Set Reports

Available reports are shown in the Report options panel. Click the folder icon to display the list of reports.

For print options see section 9.1



Part III: Integration with AQL Reporting Services

15. AQL Reporting Service

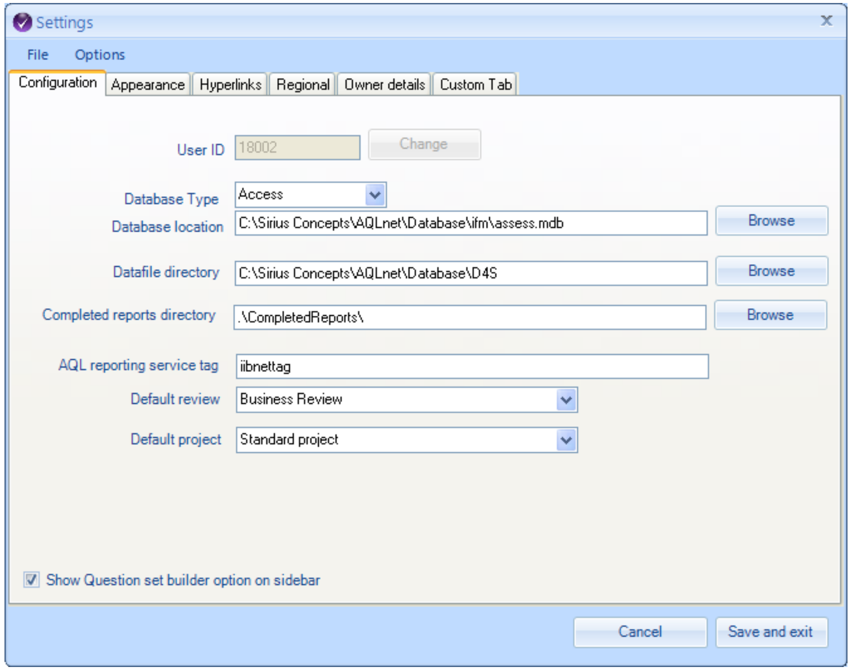
AQL Reporting Service is a web application that brings together the data for all AQLnet users working with a single agency. The data is held in a central database accessible through a web browser. The data held here may be used to monitor diagnostic activity, identify service quality issues and to gain strategic insights to client needs and priorities. The key features of the AQL Reporting Service are;

1. Intuitive web interface for accessing information stored on a SQL database anywhere, any time.
2. Backup for Adviser QL users. Individual logins and tiered access provides users with a suite of reports tailored to their needs.
3. Fast turn around on report modifications, ad hoc and new requirements.

15.1 AQL RS Setup

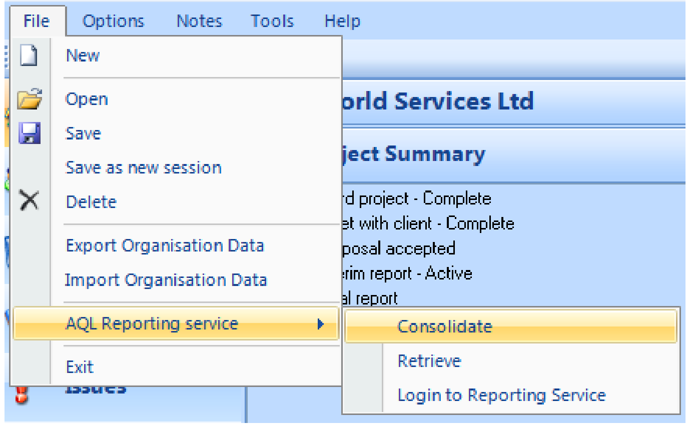
The AQL Reporting Service database and web interface is set up for the user organisation by Sirius Concepts Ltd. The url and login details will be supplied by the local administration. To enable the exchange of data between AQLnet and AQL RS a service tag must in added in the Configuration tab of the Settings option.

The service tag is unique to each user organisation. Once a valid tag has been entered the AQL Reporting Service upload and download options In the File menu bar become active.

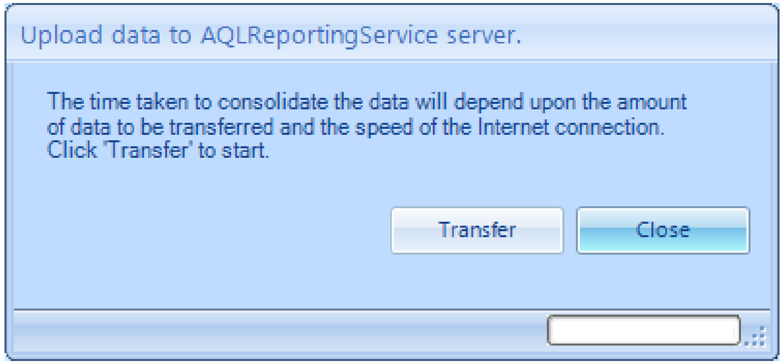


15.1 Unloading to AQL RS

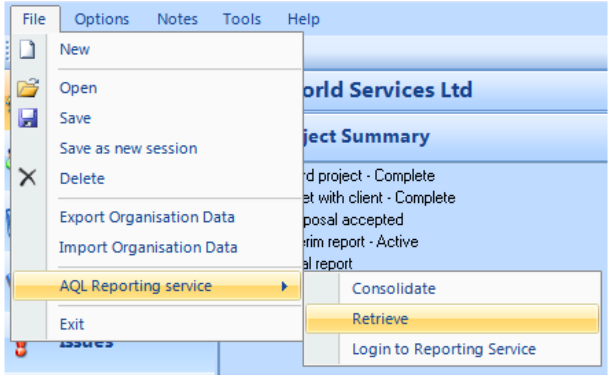
From the menu bar select

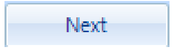


The transfer window is displayed, click Transfer to upload data. Only data that has changed since the last upload is transferred. Data held in the AQL: Reporting Service is in read only mode. Any changes must be made through AQLnet and will only appear in AQL RS after the next upload.

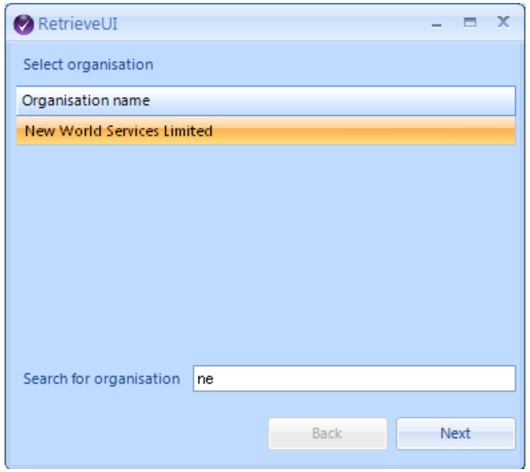


15.2 Downloading from AQL RS

From the menu bar select 

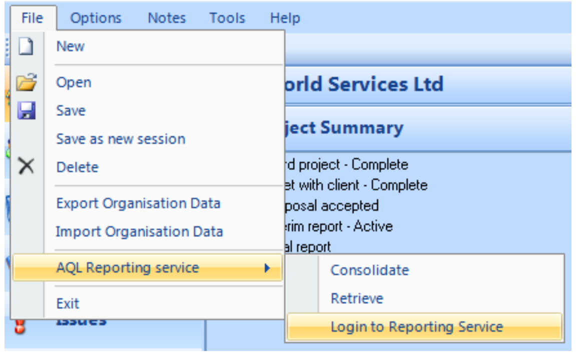
The transfer window is displayed. From the drop down select the review required, a list of organisation held in the Reporting service is displayed. Alternatively an organisation can be directly searched for using the search box. Select the organisation to be retrieved and click 

then 



15.2 Login to AQL Report Services

From the menu bar select



If you have access right to AQL Reporting Services select the option from the menu bar and enter your user name and password.